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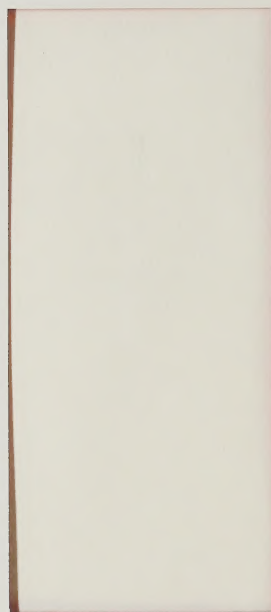
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STATISTICAL REVIEW
OF THE CANADIAN AUTOMOTIVE
INDUSTRY: 1999 EDITION




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**STATISTICAL REVIEW
OF THE CANADIAN AUTOMOTIVE
INDUSTRY: 1999 EDITION**



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This edition reflects the latest revisions and estimates provided by the various data sources. Accordingly, some historical figures appearing in the 1998 Edition have been modified. As a variety of sources are utilized in this publication, some totals may not agree.

Sale

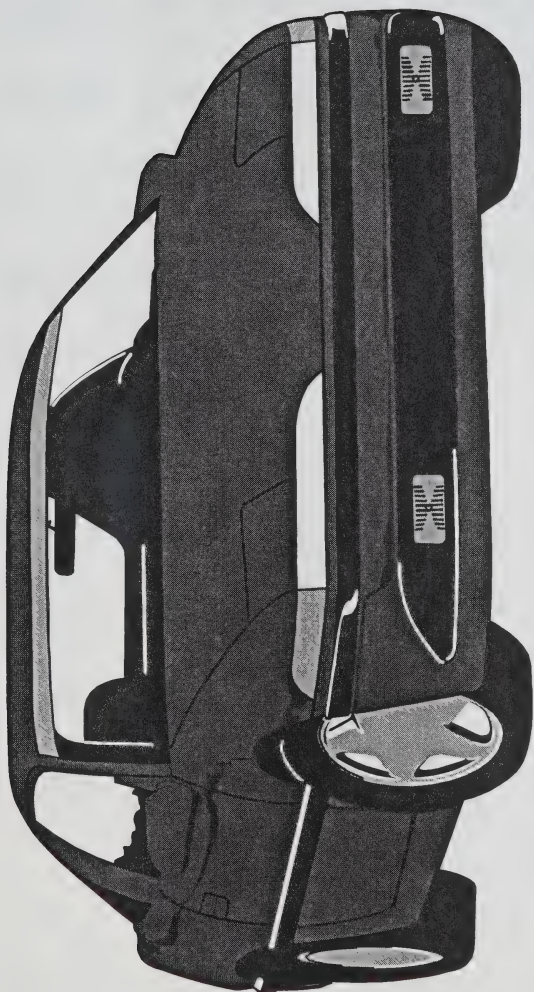


Table 1.1

Retail Sales of New Light Vehicles in Canada
(Thousands of Units)

	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Passenger Cars												
North American Produced*	711	732	661	578	557	513	533	597	557	571	631	591
Big Three	691	708	622	514	487	436	440	469	428	409	437	404
Japanese	12	18	35	54	63	62	73	102	108	134	161	148
Other	8	6	4	10	7	15	20	26	21	28	33	39
Total Imports	347	312	326	308	317	285	206	151	116	89	108	151
Big Three Imports	39	42	57	51	57	57	35	20	10	4	3	5
From Japan	35	38	47	42	49	39	25	16	6	1	0	0
From Other Sources	4	4	10	9	8	18	10	4	4	3	3	5
Other Imports	308	270	269	257	260	228	171	131	106	85	105	146
From Japan	200	190	196	193	198	183	131	91	66	48	65	98
From Other Sources**	108	80	73	64	62	45	40	40	40	37	40	48
Total Passenger Cars	1 058	1 044	987	886	874	798	739	748	673	660	739	742
Light Trucks												
North American Produced*	397	440	415	350	335	356	379	448	444	488	593	594
Big Three	397	440	415	348	332	353	373	436	432	475	575	560
Japanese	0	0	0	2	3	3	6	12	12	13	18	31
Other	0	0	0	0	0	0	0	0	0	0	0	3
Total Imports	51	52	64	63	65	57	47	31	23	24	56	56
Big Three Imports	4	5	7	6	4	4	2	0	0	0	0	0
From Japan	4	5	7	6	4	4	2	0	0	0	0	0
From Other Sources	0	0	0	0	0	0	0	0	0	0	0	0
Other Imports	47	47	57	57	61	53	45	31	23	24	56	56
From Japan	46	46	56	56	60	51	42	29	21	22	53	54
From Other Sources	1	1	1	1	1	2	3	2	2	2	3	2
Total Light Trucks	448	492	479	413	400	413	426	479	467	512	649	650
Total Light Vehicles	1 506	1 536	1 466	1 299	1 274	1 211	1 165	1 227	1 140	1 172	1 388	1 392

* Includes Mexico

** Includes Saab and Jaguar

Source: Ward's AutoInfoBank and Weekly Reports, A/AMC

Retail Sales of New Light Vehicles in the U.S.
(Thousands of Units)

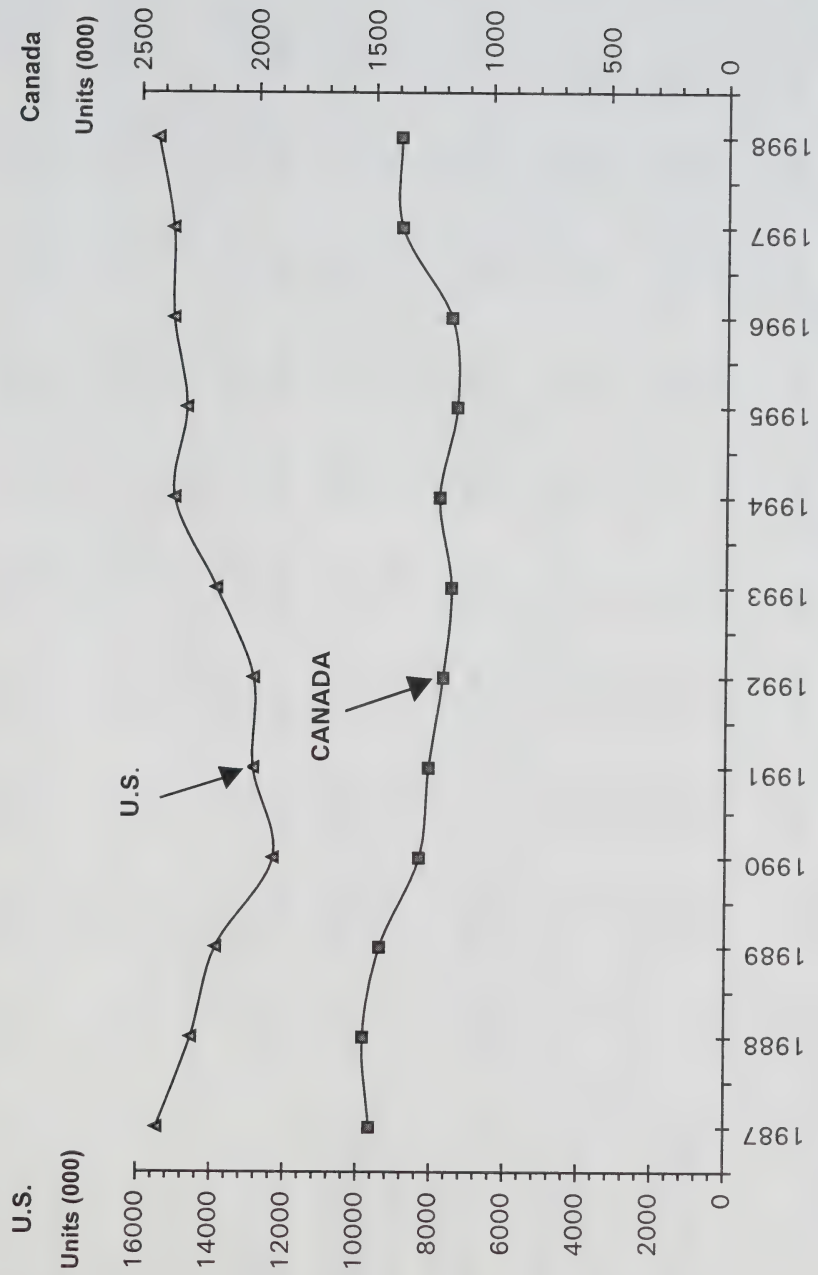
Table 1.2

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Passengers Cars											
North American Produced *	7 540	7 095	6 914	6 152	6 286	6 742	7 255	7 129	7 254	6 907	6 764
Big Three	6 735	6 042	5 482	4 676	4 816	5 156	5 414	5 138	5 002	4 735	4 674
Japanese	592	779	1 061	1 125	1 161	1 265	1 447	1 595	1 840	1 827	1 891
Other	213	274	371	351	309	321	394	396	412	345	199
Total Imports	3 004	2 680	2 384	2 023	1 928	1 775	1 735	1 506	1 274	1 365	1 379
Big Three Imports	393	341	297	255	203	166	74	74	46	59	84
From Japan	230	211	191	156	143	117	34	15	7	0	0
From Other Sources	163	130	106	99	60	49	40	59	39	59	84
Other Imports	2 611	2 339	2 087	1 768	1 725	1 609	1 661	1 432	1 228	1 306	1 295
From Japan	1 792	1 687	1 529	1 345	1 309	1 211	1 205	967	721	726	691
From Other Sources**	819	652	558	423	416	398	456	465	507	580	604
Total Passenger Cars	10 544	9 775	9 298	8 175	8 214	8 517	8 990	8 635	8 528	8 272	8 143
Light Trucks											
North American Produced *	4 200	4 114	3 957	3 604	4 247	5 000	5 658	5 691	6 129	6 267	6 745
Big Three	4 083	3 978	3 761	3 385	3 937	4 579	5 138	5 208	5 612	5 746	6 183
Japanese	117	131	162	188	277	379	474	441	460	460	518
Other	0	5	34	31	33	42	46	42	57	61	44
Total Imports	711	641	612	538	408	378	410	403	441	582	658
Big Three Imports	66	47	16	7	9	6	5	4	3	3	3
From Japan	66	47	16	7	9	6	5	4	3	3	3
From Other Sources	0	0	0	0	0	0	0	0	0	0	0
Other Imports	645	594	596	531	399	372	405	399	438	579	655
From Japan	635	583	584	523	392	361	388	369	404	533	603
From Other Sources	10	11	12	8	7	11	17	30	34	46	52
Total Light Trucks	4 911	4 755	4 569	4 142	4 655	5 378	6 068	6 094	6 570	6 849	7 403
Total Vehicles	15 455	14 530	13 867	12 317	12 869	13 895	15 058	14 729	15 098	15 121	15 546

* Includes Mexico

** Includes Saab and Jaguar

Source: Ward's Automotive Reports and Yearbook



Canadian Car Sales by Size
(Thousands of Units)

Table 1.3

	1970	1975	1980	1985	1990*	1993*	1994*	1995*	1996*	1997*	1998*
Compact	110	261	369	439	483	347	320	281	275	308	311
Percent Share of Total	22.2	36.0	49.8	56.1	54.6	46.8	43.0	41.5	41.9	41.8	41.9
Percentage Change		137.3	41.4	19.0	10.0	-28.2	-7.8	-12.2	-2.1	12.0	1.0
Intermediate	156	229	206	246	279	290	304	287	277	312	319
Percent Share of Total	31.5	31.6	27.8	31.5	31.5	39.1	40.9	42.4	42.2	42.3	43.0
Percentage Change		46.8	-10.0	19.4	13.4	3.9	4.8	-5.6	-3.5	12.6	2.2
Full-size	215	223	148	80	77	58	73	62	55	51	47
Percent Share of Total	43.4	30.8	20.0	10.2	8.7	7.8	9.8	9.2	8.4	6.9	6.3
Percentage Change		3.7	-33.6	-45.9	-3.8	-24.7	25.9	-15.1	-11.3	-7.3	-7.8
Luxury	14	12	18	17	46	46	47	47	50	66	65
Percent Share of Total	2.8	1.7	2.4	2.2	5.2	6.2	6.3	6.9	7.6	9.0	8.8
Percentage Change		-14.3	50.0	-5.6	170.6	0.0	2.2	0.0	6.4	32.0	-1.5
Total Sales	495	725	741	782	885	741	744	677	657	737	742

* Prior to 1990, data does not include import models; see Table 1.1 for total import sales for those years.

Source: Canadian Vehicle Manufacturers' Association and AIAMC, classified by Ward's segmentation.

**U.S. Car Sales by Size
(Thousands of Units)**

Table 1.4

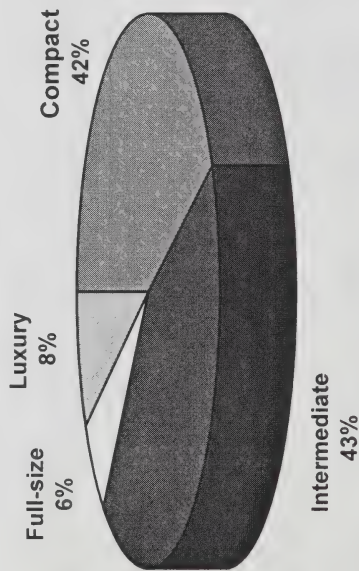
	1980	1985	1990*	1991*	1992*	1993*	1994*	1995*	1996*	1997*	1998*
Compact	2 816	3 494	3 012	2 778	2 732	2 773	2 623	2 339	2 313	2 176	2 008
Percent Share of Total	31.5	31.8	32.4	33.9	33.3	32.6	29.2	27.1	27.1	26.3	24.7
Percentage Change		24.1	-6.8	-7.8	-1.7	1.5	-5.4	-10.8	-1.1	-5.9	-7.7
Intermediate	4 441	5 110	4 146	3 562	3 605	3 696	4 098	4 191	4 223	4 093	4 164
Percent Share of Total	49.6	46.5	44.6	43.5	43.9	43.4	45.6	48.5	49.5	49.5	51.1
Percentage Change		15.1	-4.5	-14.1	1.2	2.5	10.9	2.3	0.8	-3.1	1.7
Full-size	1 166	1 299	877	685	752	943	1 054	932	843	782	669
Percent Share of Total	13.0	11.8	9.4	8.4	9.2	11.1	11.7	10.8	9.9	9.5	8.2
Percentage Change		-5.9	-16.3	-21.9	9.8	25.4	11.8	-11.6	-9.5	-7.2	-14.5
Luxury	526	1 077	1 268	1 164	1 124	1 106	1 216	1 173	1 147	1 221	1 301
Percent Share of Total	5.9	9.8	13.6	14.2	13.7	13.0	13.5	13.6	13.5	14.8	16.0
Percentage Change		104.8	9.8	-8.2	-3.4	-1.6	9.9	-3.5	-2.2	6.5	6.6
Total Sales	8 949	10 980	9 303	8 189	8 213	8 518	8 991	8 635	8 526	8 272	8 142

* Prior to 1988, data does not include import models; see Table 1.2 for total imports for those years.

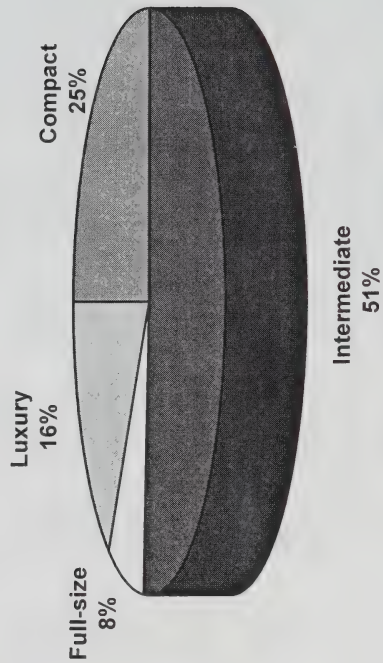
Data incomplete prior to 1980

Source: Ward's Automotive Reports, Ward's Yearbook.

CANADA



UNITED STATES



Canadian and U.S. Light Truck Sales by Segment
(Units)

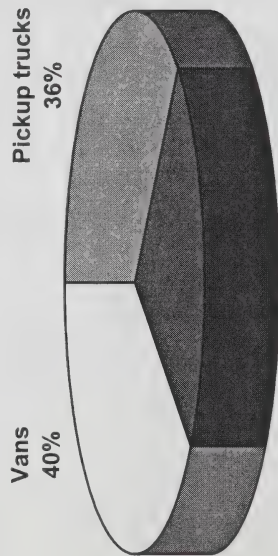
Table 1.5

	1990	1991	1992	1993	1994	1995	1996	1997	1998
Canada*									
Pickup trucks	185 369	171 729	164 548	164 707	189 060	179 914	201 156	241 052	233 685
Percent Share of Total	46.1	43.7	40.6	38.5	39.8	38.2	39.2	37.1	36.0
Percentage Change		-7.4	-4.2	0.1	14.8	-4.8	11.8	19.8	-3.1
Sports Utility Vehicles	71 413	73 064	73 053	77 007	79 480	88 258	98 379	150 455	159 590
Percent Share of Total	17.8	18.6	18.0	18.0	16.7	18.7	19.2	23.2	24.6
Percentage Change		2.3	0.0	5.4	3.2	11.0	11.5	52.9	6.1
Vans	145 198	147 781	167 260	186 090	206 857	203 005	213 810	258 280	256 280
Percent Share of Total	36.1	37.6	41.3	43.5	43.5	43.1	41.7	39.7	39.5
Percentage Change		1.8	13.2	11.3	11.2	-1.9	5.3	20.8	-0.8
Total	401 980	392 574	404 861	427 804	475 397	471 177	513 345	649 787	649 555
Percentage Change		-2.3	3.1	5.7	11.1	-0.9	8.9	26.6	0.0
United States*									
Pickup trucks	2 342 820	2 051 816	2 180 896	2 457 399	2 837 267	2 697 398	2 847 384	2 804 665	2 991 899
Percent Share of Total	51.1	49.5	46.8	45.7	46.8	44.3	43.3	40.9	40.4
Percentage Change		-12.4	6.3	12.7	15.5	-4.9	5.6	-1.5	6.7
Sports Utility Vehicles	929 066	909 072	1 133 141	1 379 600	1 556 075	1 753 417	2 140 455	2 435 301	2 794 206
Percent Share of Total	20.3	21.9	24.3	25.7	25.6	28.8	32.6	35.6	37.8
Percentage Change		-2.2	24.6	21.8	12.8	12.7	22.1	13.8	14.7
Vans	1 315 007	1 181 136	1 341 062	1 541 122	1 674 719	1 642 269	1 582 590	1 609 681	1 615 181
Percent Share of Total	28.7	28.5	28.8	28.7	27.6	27.0	24.1	23.5	21.8
Percentage Change		-10.2	13.5	14.9	8.7	-1.9	-3.6	1.7	0.3
Total	4 586 893	4 142 024	4 655 099	5 378 121	6 068 061	6 093 084	6 570 429	6 849 647	7 401 286
Percentage Change		-9.7	12.4	15.5	12.8	0.4	7.8	4.2	8.1

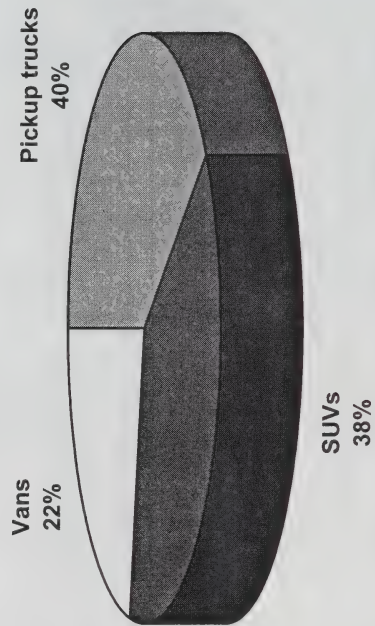
* Commercial Chassis are not included in totals

Source: Canadian Auto World, CVMA, AIAMC.

CANADA



UNITED STATES



Motor Vehicle Registrations in Canada
(Thousands of Units)

Table 1.6

	1980	1985	1987	1988	1989	1990	1993	1994	1995	1996	1997
Passenger Cars	10 256	11 118	11 773	12 086	12 811	12 622	12 925	13 131	13 192	13 251	13 487
Trucks and Truck Tractors	2 903	3 095	3 508	3 706	3 396	3 867	3 345	3 393	3 411	3 476	3 527
Buses	53	53	59	60	62	64	65	65	64	64	65
Motorcycles	389	453	414	370	348	331	309	306	297	290	299
Mopeds	*NA	35	34	31	30	28	26	24	22	21	20
Other Vehicles	118	64	76	84	72	69	61	63	60	60	80
Total	13 719	14 818	15 864	16 337	16 719	16 981	16 731	16 982	17 046	17 162	17 478

* Not available

Source: Statistics Canada Catalogue Number 53-219-XPB.

Motor Vehicle Registrations in Major Markets
(Thousands of Units)

Table 1.7

	1965	1970	1975	1980	1985	1990	1994	1995	1996	1997
Australia	3 737	4 784	6 214	7 263	8 729	9 777	10 518	11 207	10 750	11 664
Belgium	N/A	2 351	2 936	3 513	3 634	4 277	4 673	4 755	4 838	4 862
Canada	6 411	8 083	11 028	13 719	14 818	16 553	17 440	17 046	17 231	17 478
France	10 815	14 370	17 810	21 705	25 070	28 460	30 040	30 295	30 755	31 267
Germany	10 739	15 605	19 499	24 853	27 822	32 685	42 878	43 561	44 167	44 551
Italy	6 137	11 111	16 253	19 115	24 405	29 910	32 578	32 807	33 516	33 996
Japan	6 300	17 582	28 091	37 856	46 157	57 678	65 011	66 854	68 801	72 857
Netherlands	1 515	2 777	2 741	4 889	5 330	6 091	6 571	6 290	6 420	6 670
Spain	1 195	3 119	5 860	8 962	10 884	14 443	16 687	17 284	17 954	18 657
Sweden	1 935	2 447	2 931	3 077	3 383	3 925	3 912	3 953	3 981	4 040
U.K.	10 880	13 571	15 995	17 358	22 231	26 302	27 437	27 942	28 486	28 816
Mexico	N/A	1 792	3 340	5 829	7 476	9 882	11 530	11 825	12 230	12 700
U.S.	90 358	108 418	132 949	188 796	171 354	188 656	195 469	200 446	206 365	207 754
Total	150 022	206 010	265 647	356 935	371 293	428 639	464 744	474 265	485 494	495 312

Source: Data was compiled from various sources such as governments and associations' Internet-based databases, and other printed publications.

Top 15 Best Selling Passenger Cars in Canada - 1997 and 1998
(Units)

Table 1.8

Passenger Cars		
	1998	1997
1	Honda Civic	Chevrolet Cavalier
2	Chevrolet Cavalier	Honda Civic
3	Pontiac Sunfire	Pontiac Sunfire
4	Toyota Corolla	Ford Escort
5	Chrysler Neon	Toyota Corolla
6	Ford Escort	Chrysler Neon
7	Honda Accord	Toyota Camry
8	Chevrolet Malibu	Pontiac Grand Am
9	Ford Taurus	Ford Taurus
10	Toyota Tercel	Dodge Intrepid
11	Toyota Camry	Honda Accord
12	Dodge Intrepid	Saturn
13	Saturn	Chevrolet Lumina
14	Pontiac Grand Am	Toyota Tercel
15	Mazda Protegé	Ford Contour

Top 15 Best Selling Light Trucks in Canada - 1997 and 1998
(Units)

Light Vehicle Dealerships by Company In Canada

Table 1.10

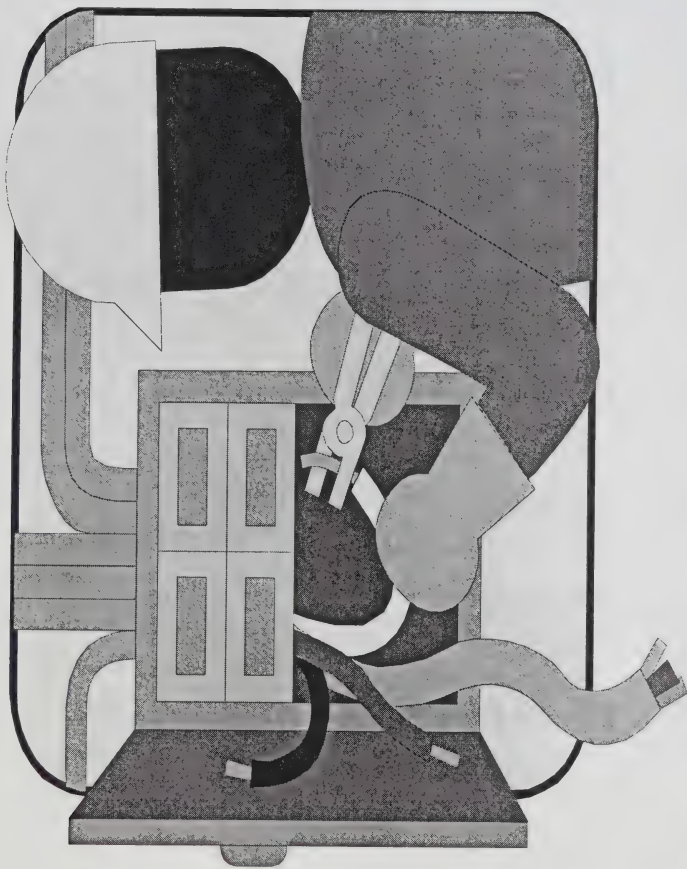
Company	1980	1985	1988	1989	1990	1993	1994	1995	1996	1997	1998
Acura	--	--	--	--	41	44	42	39	39	41	48
American Motors	256	189	--	--	--	--	--	--	--	--	--
BMW	39	43	43	42	38	35	36	33	33	30	31
Chrysler	566	555	722	695	659	601	607	609	598	586	570
Daewoo	--	--	--	--	--	--	--	--	--	--	11
Fiat	53	88	--	--	--	--	--	--	--	--	--
Ford	781	715	680	669	655	643	640	623	604	597	577
General Motors	1 091	969	969	964	947	906	868	847	824	868	848
Honda	160	188	268	256	218	217	213	205	203	203	206
Hyundai	--	173	172	157	144	156	146	139	139	142	143
Infiniti *	--	--	--	--	--	23	22	22	23	--	--
Jaguar	97	20	21	23	23	21	21	20	18	18	19
Lada	44	76	57	61	69	78	77	89	75	22	21
Land Rover	--	--	--	--	--	--	--	--	--	--	13
Lexus **	--	--	--	--	--	22	22	22	22	--	--
Mazda	130	137	164	168	176	184	181	176	167	159	151
Mercedes	57	53	51	54	56	39	57	58	56	53	49
Nissan	212	188	187	180	179	161	156	148	146	169	165
Passport/Saturn ***	--	--	40	59	70	66	65	62	--	--	--
Porche	--	--	--	--	--	--	--	--	--	--	11
Saab***	52	41	30	32	--	--	--	--	--	--	--
Skocar	--	60	27	23	34	--	--	--	--	--	--
Subaru	102	80	81	89	87	87	93	--	97	100	97
Suzuki	--	86	99	103	107	103	106	108	91	86	89
Toyota	195	208	233	237	239	234	232	229	228	251	251
Volkswagen/Audi	202	200	192	189	184	180	174	162	160	155	190
Volvo	94	72	64	61	61	53	51	48	46	46	45
Total Light Vehicle Dealers	4 131	4 141	4 100	4 062	3 987	3 853	3 809	3 734	3 569	3 526	3 535

* Figures are included with Nissan in 1997

** Figures are included with Toyota in 1997

*** Figures are included with General Motors starting in 1990.

Source: Canadian Vehicle Manufacturers' Association (CVMA), DesRosiers Automotive Yearbook.



PRODUCTION

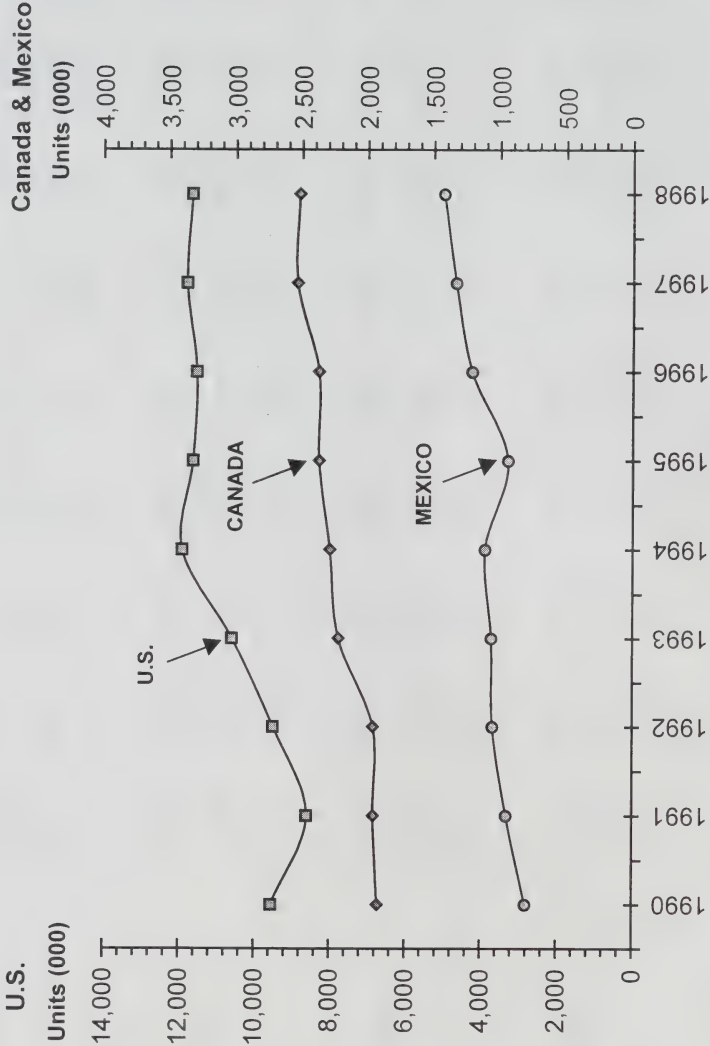
North American Production of Motor Vehicles
(Thousands of Units)

Table 2.1

	1985	1989	1990	1992	1993	1994	1995	1996	1997	1998
Canada										
Passenger Cars	1 183	1 020	1 093	1 032	1 353	1 215	1 337	1 280	1 373	1 481
Light Trucks	729	926	828	923	866	1 069	1 029	1 088	1 161	1 040
Light Vehicles	1 912	1 946	1 921	1 955	2 219	2 284	2 366	2 368	2 534	2 521
Heavy-Duty Trucks/Buses*	22	43	15	19	25	36	41	29	37	49
Total Vehicles	1 934	1 989	1 936	1 974	2 244	2 320	2 407	2 397	2 571	2 570
U.S.										
Passenger Cars	8 155	6 821	6 078	5 667	5 982	6 601	6 340	6 083	5 934	5 554
Light Trucks	3 175	3 781	3 464	3 825	4 608	5 305	5 285	5 449	5 859	6 073
Light Vehicles	11 330	10 602	9 542	9 492	10 590	11 906	11 625	11 532	11 793	11 627
Heavy-Duty Trucks/Buses*	277	254	226	217	265	333	370	299	338	342
Total Vehicles	11 607	10 856	9 768	9 709	10 855	12 239	11 995	11 831	12 131	11 969
Mexico										
Passenger Cars	268	439	598	777	835	874	705	798	854	956
Light Trucks	177	191	206	274	226	235	230	411	477	446
Light Vehicles	445	630	804	1 051	1 061	1 109	935	1 209	1 331	1 402
Heavy-Duty Trucks/Buses*	12	10	9	35	26	31	5	10	23	37
Total Vehicles	457	640	813	1 086	1 087	1 140	940	1 219	1 354	1 439
North America Total										
Passenger Cars	9 606	8 280	7 769	7 476	8 170	8 690	8 382	8 161	8 161	7 991
Light Trucks	4 081	4 898	4 498	5 022	5 700	6 609	6 544	6 948	7 497	7 559
Light Vehicles	13 687	13 178	12 267	12 498	13 870	15 299	14 926	15 109	15 658	15 550
Heavy-Duty Trucks/Buses*	311	307	250	271	316	400	416	338	398	428
Total Vehicles	13 998	13 485	12 517	12 769	14 186	15 699	15 342	15 447	16 056	15 978

*Includes motor homes and chassis

Source: Ward's AutoInfoBank, Automotive Reports and Yearbooks, AAMA, CVMA



Company

Ranked by 1998 North
American Production*

	1995 Ranking	1996 Ranking	1997 Ranking	1998 Ranking
General Motors	5 516	4 943	1	4 992
Ford	4 233	4 233	2	4 326
DaimlerChrysler	2 453	2 461	3	4 254
Toyota	472	483	6	969
Honda	659	780	4	895
Nissan	572	550	5	529
NUMMI	352	356	7	362
Volkswagen	192	238	8	339
Subaru-Isuzu	180	195	9	216
Auto Alliance (formerly Mazda)	148	129	11	167
Diamond Star	218	192	10	157
CAMI	194	124	12	45

Ranked by 1998 World Production

General Motors	8 800	8 400	1	8 198	1	7 560
Ford	6 476	6 750	2	7 047	2	6 823
Toyota	4 694	4 756	3	4 890	3	5 290
Volkswagen	3 413	3 977	4	4 291	4	4 823
DaimlerChrysler	2 762	2 861	5	2 819	7	4 423
Fiat	1 740	2 586	7	2 886	5	2 660
Nissan	2 785	2 742	6	2 878	6	2 556
Honda	1 750	2 084	8	2 316	8	2 330
Renault	1 750	1 804	10	1 940	11	2 283
Peugeot-Citroen	1 888	1 147	13	2 052	10	2 270
Suzuki	1 655	1 789	11	1 875	12	1 672
Mitsubishi	2 011	1 943	9	2 033	9	1 664

* Includes Mexico

Source: Ward's Automotive Reports, Automotive News.

Motor Vehicle Production by Major Producing Country
(Thousands of Units)

Table 2.3

	1965	1970	1975	1980	1985	1990	1995	1996	1997	1998
U.S.	11 114	8 263	8 965	8 010	11 648	9 768	11 972	11 832	12 149	12 042
Japan	1 876	5 289	6 941	11 043	12 271	13 487	10 195	10 346	11 177	10 976
Germany	2 976	3 842	3 186	3 879	4 446	4 661	4 515	4 351	4 537	5 721
France	1 642	2 750	2 861	3 378	3 016	3 295	2 740	2 728	3 047	2 910
Spain	229	536	814	1 182	1 418	1 679	2 308	2 412	2 531	2 752
Canada	846	1 193	1 442	1 374	1 930	1 922	2 401	2 397	2 578	2 568
South Korea	-	29	36	123	378	1 322	2 679	2 813	2 867	1 994
U.K.	2 177	2 098	1 648	1 313	1 311	1 296	1 738	1 929	1 941	1 987
Brazil	185	416	930	1 165	967	914	1 650	1 813	2 067	1 573
Italy	1 176	1 854	1 459	1 612	1 573	1 875	1 623	1 547	1 811	1 657
Mexico	NA	NA	NA	NA	398	804	944	1 222	1 336	1 428
Russia	634	916	1 964	2 199	2 200	2 000	1 276	1 077	1 264	1 075

Source: Ward's Automotive for Canada, United States and Mexico; Automotive News for remaining countries (ranked by 1998 production).

Table 2.4

Average Unit Value of Canadian Motor Vehicle Production

	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Number of Units Produced (Thousands)	1 648	1 780	1 964	1 948	1 887	1 973	2 254	2 321	2 408	2 397	2 571	2 570
Value of SIC 3231 Shipments* (Millions of Dollars)	22 154	28 114	27 519	27 239	26 017	29 564	37 657	43 632	50 632	50 473	56 529	59 636
Unit Value (Dollars)	13 443	15 794	14 012	13 983	13 787	14 984	16 707	18 799	21 027	21 057	21 987	23 205

* Preliminary data based on Statistics Canada Catalogue Number 31-001-XPB.

Source: Statistics Canada and Ward's Automotive Reports.

Industrial Product Price Indices* by Industry
(1992 = 100)

Table 2.5

	1992	1993	1994	1995	1996	1997	1998
Motor Vehicle Industry (SIC 323)	100.0	107.5	114.7	118.7	122.8	127.1	138.5
Trailer and Bus Body and Trailer Industry (SIC 324)	100.0	101.8	99.8	105.8	110.0	111.5	112.6
Motor Vehicle Parts and Accessories Industry (SIC 325)	100.0	100.5	103.8	107.1	108.7	108.7	112.0

* The Industrial Product Price Indices (IPPI) measure price changes for major commodities sold by Canadian manufacturers.

Value of Shipments in Canadian Automotive Industries
(Millions of Dollars)

Table 2.6

	1965	1970	1975	1980	1985	1990	1994	1995	1996	1997	1998
Motor Vehicle Manufacturers	2 120	2 963	6 024	10 071	24 599	27 239	43 632	49 474	47 902	56 509	59 637
Truck Body and Trailer Manufacturers	103	244	774	978	1 148	1 411	1 517	1 923	2 002	2 132	2 569
Motor Vehicle Parts and Accessories Manufacturers	756*	1 408*	2 552*	4 034	12 923	13 902	18 391	22 333	23 840	25 426	27 720
Automotive Tire and Tube Manufacturers**	NA	NA	NA	NA	1 653	1 350	1 550	1 744	1 754	1 773	1 940
Total	2 223	3 207	6 798	15 083	40 323	43 902	65 090	75 474	75 498	85 840	91 866

* Includes automobile fabric and accessories manufacturers

** Information supplied by companies

Note: Data for 1997 and 1998 are based on preliminary shipments

Source: Statistics Canada Catalogue Numbers 31-001-XPB, 31-203-XPB and 42-251-XPB.

International Sourcing Pattern of Original Equipment Parts of Five Major Vehicle Manufacturers*
(Purchases from In-house and Independent Suppliers)
(Millions of Dollars)

Table 2.7

	1965	1970	1975	1980	1985	1989	1990	1993	1994	1995	1996
U.S. Purchases from In-House Suppliers in Canada	17	454	797	1 604	4 621	4 845	4 621	5 288	4 939	4 569	4 756
Canadian Purchases from In-House Suppliers in U.S.	522	1 153	2 209	3 992	8 490	8 494	8 981	6 571	11 409	12 704	15 434
U.S. Purchases from Independent Suppliers in Canada	74	487	876	1 253	3 381	3 486	2 661	2 522	2 686	2 939	3 519
Canadian Purchases from Independent Suppliers in U.S.	236	505	1 051	1 226	3 871	6 226	5 647	4 393	8 140	12 787	12 466

* General Motors, Ford, Chrysler (includes AMC prior to 1987), CAMI (starting in 1989) and Navistar.

Source: 1965-1977 data prepare by the Reisman Commission. 1978-1996 data prepared by Industry Canada

	1991	1992	1993	1994	1995	1996	1997	1998	1998 Market Share
CAMI (GM/Suzuki)	135 184	125 435	154 650	170 231	183 510	124 100	99 770	45 063	1.79
DaimlerChrysler	491 683	464 523	643 371	695 630	538 097	705 446	687 286	738 321	29.28
Ford	426 030	500 584	473 331	494 829	533 443	537 082	622 571	627 384	24.88
GM	697 516	669 940	747 435	723 903	907 833	752 371	750 340	750 907	29.78
Honda	99 150	104 123	100 621	108 308	106 133	144 482	165 181	179 797	7.13
Hyundai	28 201	15 186	14 585	0	0	0	0	0	0.00
Toyota	67 834	68 092	79 219	85 871	90 136	97 344	108 952	171 739	6.81
Volvo	7 661	6 304	5 504	6 436	7 588	7 127	6 548	8 373	0.33
Total Production	1 953 259	1 954 187	2 218 716	2 285 208	2 366 740	2 367 952	2 440 648	2 521 584	100.00

Source: DesRosiers Automotive Yearbook, 1999; Ward's Auto Infobank

U.S. Light Vehicle Production by Company
(Units)

Table 2.9

	1991	1992	1993	1994	1995	1996	1997	1998	1998 Market Share
Auto Alliance (Ford/Mazda)	165 314	168 859	219 096	247 004	149 562	129 441	100 394	167 268	1.44
BMW	0	0	0	385	11 877	50 278	62 943	54 802	0.47
DaimlerChrysler	1 073 850	1 283 369	1 427 555	1 693 535	1 718 583	1 694 121	1 705 657	1 809 342	15.56
Diamond Star/Mitsubishi	153 936	139 783	136 022	169 829	218 161	192 961	189 086	157 139	1.35
Ford	2 395 644	2 784 448	3 294 217	3 655 762	3 371 424	3 474 707	3 458 343	3 449 023	29.66
GM	3 581 595	3 735 726	4 040 453	4 403 909	4 222 624	3 994 720	4 233 144	3 863 421	33.23
Honda	451 197	458 251	403 775	498 710	552 995	634 374	648 268	694 703	5.97
Mercedes Benz	0	0	0	0	84	766	20 205	68 727	0.59
Nissan	265 023	300 326	386 973	444 608	465 786	414 031	398 308	308 837	2.66
NUMMI (GM/Toyota)	209 169	256 231	321 428	363 040	352 675	365 469	357 809	361 859	3.11
Subaru-Isuzu	116 297	124 020	126 558	153 883	180 174	194 871	186 891	216 198	1.86
Toyota	187 726	240 382	234 060	275 678	381 445	385 657	431 811	476 203	4.10
Total Production	8 599 751	9 491 395	10 590 137	11 906 343	11 625 390	11 531 396	11 792 859	11 627 522	100.00

Mexico Light Vehicle Production by Company
(Units)

	1991	1992	1993	1994	1995	1996	1997	1998	1998 Market Share
BMW	0	0	0	0	245	487	970	1 945	0.14
DaimlerChrysler	193 941	235 160	228 898	256 632	211 132	360 333	352 441	361 802	25.79
Ford	217 501	255 083	215 631	240 888	226 651	213 078	244 704	186 002	13.26
GM	183 933	200 360	192 279	161 094	198 407	265 804	299 485	316 516	22.56
Honda	0	0	0	0	135	1 194	3 045	7 194	0.51
Mercedes Benz	0	0	400	590	814	1 043	955	722	0.05
Nissan	142 824	172 562	185 782	193 591	106 794	135 637	172 763	189 787	13.53
Porsche	0	0	0	0	0	29	20	13	0.00
Volkswagen	208 901	188 488	238 992	256 317	191 438	231 078	257 366	338 959	24.16
Total Production	947 100	1 051 653	1 061 982	1 109 112	935 616	1 208 683	1 331 749	1 402 940	100.00

Source: Ward's AutoInfoBank

Total North American Light Vehicle Production by Company
(Units)

Table 2.11

	1991	1992	1993	1994	1995	1996	1997	1998	1998 % Market Share
Auto Alliance (Ford/Mazda)	165 314	168 859	219 096	247 004	149 562	129 441	100 394	167 268	1.08
BMW	0	0	0	385	12 122	50 765	63 913	56 747	0.36
CAMI (GM/Suzuki)	135 184	125 435	154 650	170 231	183 510	124 100	99 770	45 063	0.29
DaimlerChrysler	1 759 474	1 983 052	2 299 824	2 645 289	2 467 812	2 759 900	2 685 255	2 909 495	18.71
Diamond Star/Mitsubishi	153 936	139 783	136 022	169 829	218 161	192 961	189 086	157 139	1.01
Ford	3 039 175	3 540 115	3 983 179	4 391 477	4 130 049	4 224 867	4 333 876	4 262 409	27.41
GM	4 463 044	4 606 026	4 980 167	5 288 493	5 328 864	5 012 895	5 427 603	4 930 844	31.71
Honda	550 347	562 374	504 396	607 018	659 263	780 050	816 494	881 694	5.67
Hyundai	28 201	15 186	14 585	0	0	0	0	0	0.00
Mercedes Benz	0	0	400	590	898	1 809	21 160	69 449	0.45
Nissan	407 847	472 888	572 755	638 199	572 580	549 668	571 071	498 624	3.21
NUMMI (GM/Toyota)	209 169	256 231	321 428	363 040	352 675	365 469	357 809	361 859	2.33
Porsche	0	0	0	0	0	29	20	13	0.00
Subaru-Isuzu	116 297	124 020	126 558	153 883	180 174	194 871	186 891	216 198	1.39
Toyota	255 560	308 474	313 279	361 549	471 581	483 001	540 763	647 942	4.17
VW	208 901	188 488	238 992	256 317	191 438	231 107	257 397	338 959	2.18
Volvo	7 661	6 304	5 504	6 436	7 588	7 127	6 548	8 373	0.05
Total Production	11 500 110	12 497 235	13 870 835	15 299 740	14 926 277	15 108 060	15 658 050	15 552 076	100.00

(Millions of Dollars)

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996
Motor Vehicles	19 026	19 600	34 309	40 279	39 326	36 847	21 801	24 601	31 512	36 609	40 680	37 972
Truck and bus body	199	248	290	367	401	287	279	210	219	264	295	271
Commercial trailers	264	308	430	442	368	310	166	1 459	185	274	446	424
Non-commercial trailers	176	220	266	329	300	240	125	156	177	223	288	258
Mobile homes	77	58	59	79	99	112	98	102	116	139	135	150
Total	716	834	1 045	1 217	1 168	949	668	1 927	697	900	1 164	1 103
Engines and parts	2 170	1 645	2 028	2 143	2 357	1 720	881	1 129	1 495	1 898	1 706	2 238
Wiring assemblies	148	187	185	172	253	239	200	230	439	591	701	597
Stampings	680	1 060	1 133	1 321	1 421	1 305	1 298	1 430	1 572	1 854	2 131	2 119
Steering and suspension	295	288	307	429	480	155	345	428	564	784	849	832
Wheel and brake	442	419	472	540	597	535	416	476	532	634	715	721
Plastic parts	551	551	669	720	838	598	527	571	693	895	1 009	1 001
Fabrics	488	488	524	609	648	740	699	862	995	1 274	1 324	1 379
Other motor vehicle parts	1 589	1 589	1 669	2 086	2 381	2 430	2 635	2 869	3 082	3 608	4 296	4 376
Total parts	6 363	6 227	6 987	8 020	8 975	7 722	7 001	7 995	9 372	11 538	12 731	13 263
Total industry	26 105	26 661	42 341	49 516	49 469	45 518	29 470	34 523	41 581	49 047	54 575	52 338

* Represents cost of items used in the manufacturing process.

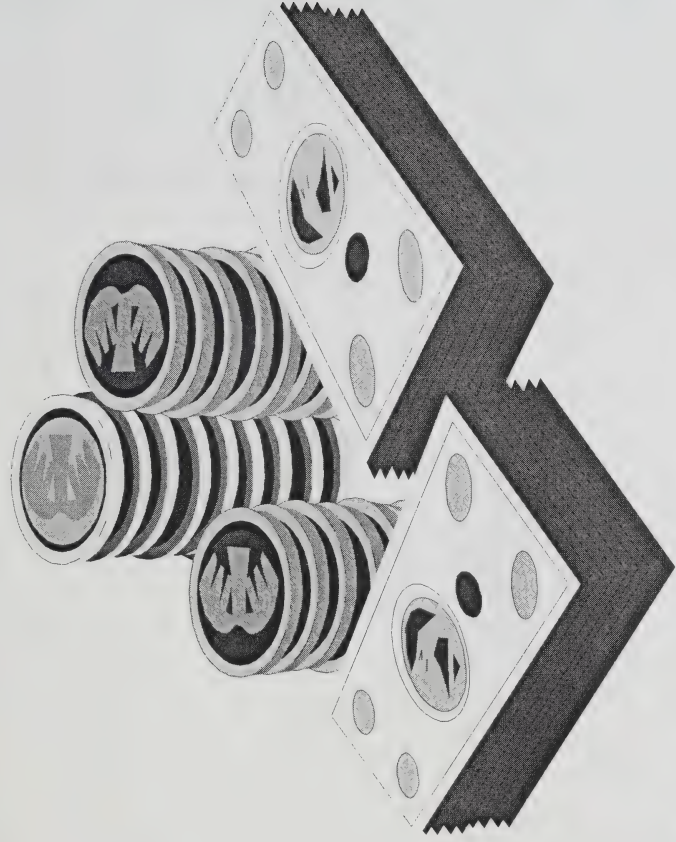
Source: Statistics Canada Catalogue Number 42-251B and 31-203-XPB.

Census Value Added* in the Canadian Automobile Industry
(Millions of Dollars)

Table 2.13

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996
Motor Vehicles	4 713	4 474	4 751	6 270	6 630	6 161	6 101	4 957	6 013	7 960	8 719	9 785
Truck and bus body	173	186	241	267	295	182	166	217	230	251	303	369
Commercial trailers	137	162	195	214	238	188	119	106	136	202	265	271
Non-commercial trailers	89	111	126	137	143	118	77	84	101	122	130	143
Mobile homes	36	30	32	40	77	73	55	71	83	89	83	105
Total	435	489	594	658	752	560	417	478	550	664	781	888
Engines and parts	1 662	1 399	1 566	1 565	1 696	1 168	609	527	964	1 010	1 389	1 988
Wiring assemblies	141	209	193	194	234	212	185	190	395	542	485	547
Stampings	949	1 023	979	991	853	842	833	895	1 211	1 407	1 587	1 590
Steering and suspension	353	356	405	411	428	390	328	393	524	637	730	832
Wheel and brake	543	494	507	512	513	459	412	474	551	679	713	694
Plastic parts	438	576	606	603	605	526	476	506	695	799	831	947
Fabrics	387	410	404	409	464	480	505	592	628	729	778	810
Other motor vehicle parts	1 709	1 624	1 696	1 725	1 837	1 916	2 166	2 286	2 391	2 529	2 837	3 009
Total	6 182	6 091	6 356	6 409	6 630	5 994	5 514	5 863	7 359	8 332	9 350	10 417
Total Industry	11 330	11 054	11 701	13 337	14 013	12 715	12 032	11 298	13 922	16 956	18 850	21 090

* Difference between the value of goods and industrial services produced and the direct material costs associated with the production of the goods and services.



Investment/Research and Development/Exchange Rates/Prices/GDP

New Capital Expenditures in Canadian Automotive Industries
(Millions of Dollars)

Table 3.1

	1965	1970	1975	1980	1985	1990	1994	1995	1996	1997	1998	1999*
Motor Vehicle Manufacturers (SIC 323)	66	32	61	136	714	787	1 342	1 608	2 915	3 184	2 486	2 286
Truck Body Manufacturers (SIC 324)**	25	13	19	47	9	8	66	86	79	87	52	66
Motor Vehicle Parts and Accessories Manufacturers (SIC 325)	107	170	81	781	332	457	1 774	1 656	818	1 184	1 234	755
Automotive Dealers (SIC 631)***	N/A	N/A	N/A	192	292	316	1 017	1 261	1 005	924	1 012	1 038
Total	198	215	161	1 156	1 347	1 568	4 199	4 611	4 817	5 379	4 732	4 079

* Intentions

** Decrease from 1993 to 1994 is due to a change in the survey sample.

*** Data for 1991 onward also includes recreational vehicle dealers, gasoline service stations, repair shops and parts and accessories dealers. Revised data for previous years is not available.

Note: Decrease in 1996 for SIC 325 is due to capital investment that was planned and took place only in 1997.

Source: Statistics Canada catalogue Number 61-205-XPB.

Research and Development in the Motor Vehicle Industries
(SIC 323, 324 and 325)

Table 3.2

	1965	1970	1981	1985	1990	1991	1992	1993	1994	1995	1996	1997*
Number of R&D Performers	20	28	33	39	46	39	50	53	153	143	131	98
Total R&D Personnel (Person Years)	NA	NA	890	1 050	895	860	865	975	1 534	1 478	1 463	1 338
Total R&D Expenditures (Millions of Dollars)	3	12	50	78	69	77	83	125	212	185	170	175
R&D Expenditures as Percentage of Shipments	0.08	0.21	0.28	0.19	0.16	0.19	0.18	0.22	0.29	0.21	0.19	0.20

* Preliminary figures

R&D data for 1991 has been revised due to the industry reclassification of a larger R&D performer. Starting in 1996, data may be incomplete due to new methodology adopted by Statistics Canada.

Exchange Rates (Canadian dollars)

	1965	1970	1975	1980	1985	1990	1995	1996	1997	1998
U.S. dollar	1.078	1.077	1.017	1.169	1.366	1.167	1.377	1.390	1.387	1.484
British pound	3.014	2.502	2.259	2.720	1.771	2.082	2.302	2.280	2.222	2.459
French franc	0.220	0.189	0.238	0.277	0.153	0.215	0.228	0.224	0.231	0.252
German mark	0.270	0.286	0.414	0.644	0.468	0.724	0.768	0.757	0.777	0.845
Japanese yen (000)	3.000	2.920	3.430	5.190	5.770	8.100	11.950	11.800	11.480	11.400

Source: Statistics Canada, Canadian Economic Observer, Catalogue Numbers 11-210-XPB and 11-010-XPB

Average Prices of Passenger Cars
 (\$ Canadian)

Table 3.4

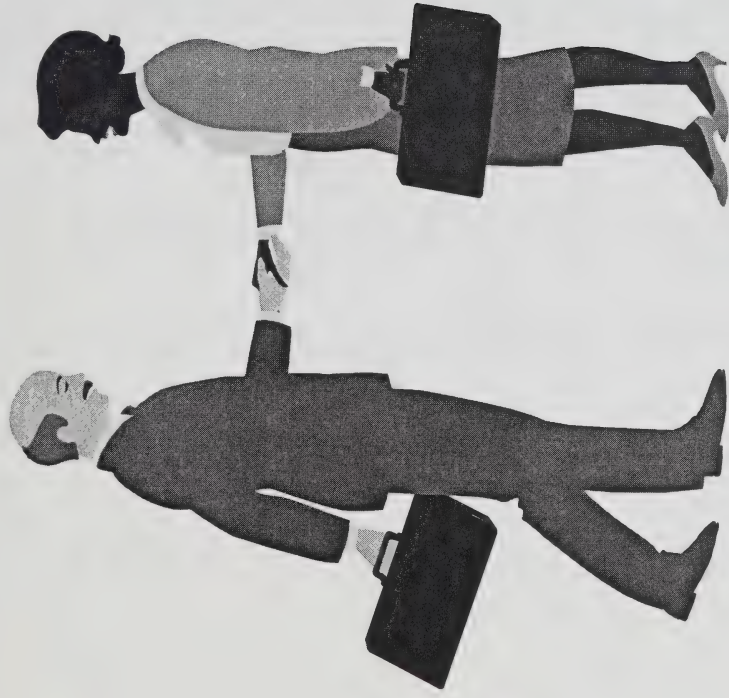
	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
North American	12 949	14 312	15 290	16 339	16 876	15 766	16 785	17 459	18 478	20 009	21 066	21 937	21 066
Japan	13 831	14 665	15 522	16 228	16 755	15 940	17 128	18 139	18 110	20 875	23 345	22 921	23 345
Other Countries	15 292	17 759	21 013	22 114	22 374	20 519	20 513	22 389	27 136	29 036	33 025	35 259	33 025
Total all Countries	14 024	15 579	17 275	18 227	18 668	17 408	18 142	19 329	21 241	23 307	25 812	26 706	25 812

Gross Domestic Product (1992 Factor Cost)
(\$ Millions)

Table 3.5

	1992	1993	1994	1995	1996	1997	1998
Total Industry							
Manufacturing Industries	604 275	619 194	643 063	655 088	665 277	698 259	717 548
96 181	101 877	108 403	113 740	114 942	123 155	128 018	
Motor Vehicle Industry	4 232	5 381	5 786	6 052	5 934	6 516	6 743
Truck and bus body and trailer industries	407	472	573	665	675	756	858
Motor vehicle engine and engine parts	320	535	601	587	682	869	955
Motor vehicle wiring assemblies	157	329	426	437	462	429	410
Motor vehicle stampings	763	906	1 024	1 120	1 149	1 532	1 635
Motor vehicle steering and suspension parts	313	420	534	582	575	654	749
Motor vehicle wheel and brakes	387	434	487	509	474	443	481
Plastic parts and accessories	412	616	744	836	845	1 016	1 007
Motor vehicle fabric accessories	485	539	358	715	746	746	748
Other motor vehicle parts and accessories	2 002	2 152	2 324	2 626	2 631	2 911	2 908
Motor vehicle parts and accessories industries	4 839	5 931	6 498	7 412	7 564	8 198	8 893
Total Automotive Industry	9 478	11 784	12 857	14 129	14 173	15 470	16 494
Percent of Manufacturing GDP	9.85	11.57	11.86	12.42	12.33	12.56	12.88
Percent of Total Industry GDP	1.57	1.90	2.00	2.16	2.13	2.22	2.30

Source: Statistics Canada, Catalogue Number 15-001-X/PB



Trade and Auto Pact Data

	1965	1970	1975	1980	1985	1990	1995	1996	1997
Canadian Exports									
Cars	156	1 604	3 021	4 859	16 672	16 318	35 582	35 582	37 012
Trucks and Other Vehicles*	31	664	1 190	2 445	6 609	8 077	11 822	12 008	14 149
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	93	151	193	223
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	324	618	568	706
Parts	183	1 226	2 225	3 825	11 819	10 480	14 809	15 640	17 420
Tires and Tubes	8	18	73	262	637	721	1 239	1 353	1 559
Rubber Parts	N/A	N/A	N/A	N/A	N/A	112	221	157	227
Total	378	3 512	6 509	11 391	35 737	36 125	64 442	65 501	71 296
Canadian Imports									
Cars	207	876	2 548	4 417	11 293	10 671	13 251	13 925	17 720
Trucks and Other Vehicles*	62	298	987	1 347	2 950	3 114	6 434	6 154	7 530
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	100	91	94	103
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	57	139	153	167
Parts	818	2 237	4 631	7 955	18 897	19 175	35 231	35 768	39 874
Tires and Tubes	12	43	256	354	471	675	1 149	1 082	1 234
Rubber Parts	N/A	N/A	N/A	N/A	N/A	60	195	124	144
Total	1 099	3 454	8 422	14 073	33 611	33 852	56 490	57 300	66 772
Balances									
Cars	(51)	728	473	442	5 379	5 647	22 331	21 657	19 292
Trucks and Other Vehicles*	(31)	366	203	1 098	3 659	4 963	5 388	5 854	6 619
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	193	242	287	326
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	381	757	721	873
Parts	(635)	(1 011)	(2 406)	(4 130)	(7 078)	(8 695)	(20 422)	(20 128)	(22 454)
Tires and Tubes	(4)	(25)	(183)	(92)	166	46	90	271	325
Rubber Parts	N/A	N/A	N/A	N/A	N/A	172	416	281	371
Total	(721)	58	(1 913)	(2 682)	2 126	2 273	7 952	8 201	4 524

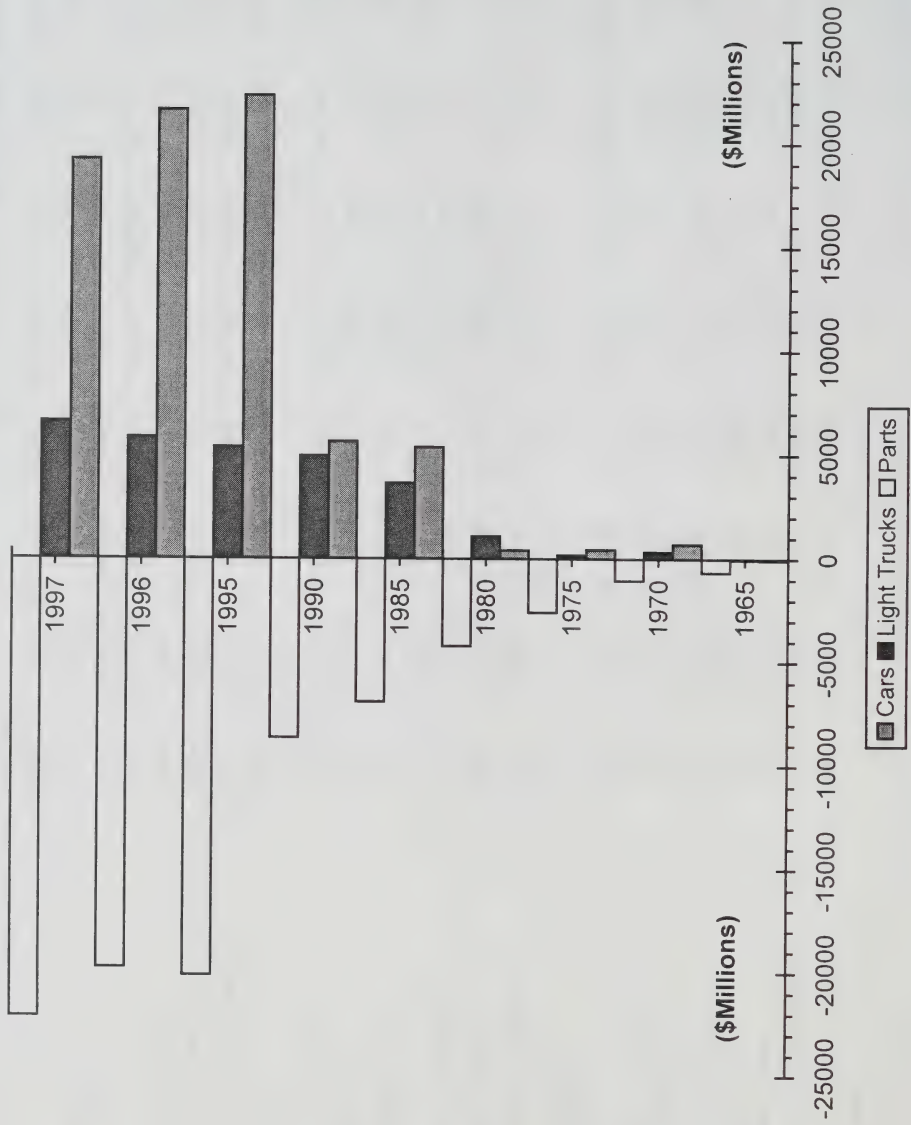
* Trucks include mini-vans, light and heavy-duty trucks. For breakdown of light trucks and heavy-duty trucks, refer to "Automotive Trade" publication.

Other vehicles include buses, specialty vehicles.

Data for years following 1989 compiled by Industry Canada using Statistics Canada data and definitions.

Total Canadian Automotive Trade

Graph 4.1



	1965	1970	1975	1980	1985	1990	1995	1996	1997
U.S. Imports from Canada									
Cars	74	1 538	2 858	4 452	15 277	16 171	34 605	34 994	36 500
Trucks and Other Vehicles*	21	589	932	2 218	6 422	7 982	11 587	11 816	13 797
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	N/A	109	346	133
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	N/A	560	555	691
Parts	151	1 127	2 045	3 405	11 512	9 989	13 055	14 290	15 824
Tires and Tubes	4	15	68	231	592	708	1 214	1 327	1 519
Rubber Parts	N/A	N/A	N/A	N/A	N/A	N/A	397	268	397
Total	250	3 269	5 903	10 306	33 803	34 850	61 527	63 596	68 861
Canadian Imports from the U.S.									
Cars	94	659	2 183	3 388	8 566	6 885	9 633	10 279	12 527
Trucks and Other Vehicles*	60	275	942	1 217	2 570	2 736	6 006	5 525	6 923
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	N/A	52	68	66
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	N/A	64	142	156
Parts	797	2 107	4 425	7 600	17 438	16 252	31 277	31 538	35 464
Tires and Tubes	10	24	174	146	264	442	839	811	967
Rubber Parts	N/A	N/A	N/A	N/A	N/A	N/A	195	124	144
Total	961	3 065	7 724	12 351	28 838	26 315	48 066	48 487	56 247
Balances									
Cars	(20)	879	675	1 064	6 711	9 286	24 972	24 715	23 973
Trucks and Other Vehicles*	(39)	314	(10)	1 001	3 852	5 246	5 581	6 291	6 874
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	N/A	161	414	199
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	N/A	624	697	847
Parts	(646)	(980)	(2 380)	(4 195)	(5 926)	(6 263)	(18 222)	(17 248)	(19 640)
Tires and Tubes	(6)	(9)	(106)	85	328	266	375	516	552
Rubber Parts	N/A	N/A	N/A	N/A	N/A	N/A	592	392	541
Total	(711)	204	(1 821)	(2 045)	4 965	8 535	13 461	15 109	12 614

* Trucks include mini-vans, light and heavy-duty trucks. For breakdown of light trucks, refer to "Automotive Trade" publication. Other vehicles include buses, specialty vehicles and motor homes.

Data for years following 1989 compiled by Industry Canada using Statistics Canada data and definitions.

Source: *Statistics Canada Catalogue Numbers 65-001P and 11-001E (1965-1989)*.

Canada-Mexico Trade in Automotive Products
(Millions of Dollars)

Table 4.3

	1989	1990	1991	1992	1993	1994	1995	1996	1997
Canadian Exports									
Cars	0	1	1	0	5	61	43	63	37
Trucks and Other Vehicles*	0	0	1	1	0	0	0	1	0
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	0	0	454	806
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	0	0	0	0
Parts	76	69	83	155	139	63	187	176	279
Tires and Tubes	2	1	1	1	1	7	0	0	12
Rubber Parts		N/A	N/A	N/A	N/A	0	0	0	0
Total	78	71	86	157	145	131	230	694	1 134
Canadian Imports									
Cars	73	117	673	534	881	1 059	1 416	1 464	1 459
Trucks and Other Vehicles*	1	17	43	68	81	101	153	204	276
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	0	0	0	0
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	0	0	316	462
Parts	678	789	1 030	1 125	1 442	1 672	1 545	1 597	1 946
Tires and Tubes	0	0	0	0	0	2	4	2	3
Rubber Parts	N/A		N/A	N/A	N/A	1 526	888	357	2 398
Total	752	923	1 746	1 727	2 404	4 360	4 006	3 940	6 544
Balances									
Cars	(72)	(116)	(673)	(534)	(876)	(998)	(1 373)	(1 401)	(1 422)
Trucks and Other Vehicles*	(1)	(17)	(42)	(67)	(81)	(101)	(153)	(203)	(276)
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	0	0	454	806
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	0	0	316	462
Parts	(609)	(720)	(947)	(970)	(1 303)	(1 609)	(1 358)	(1 421)	(1 667)
Tires and Tubes	1	1	1	1	1	5	(4)	(2)	9
Rubber Parts	N/A	N/A	N/A	N/A	N/A	1 526	888	357	2 398
Total	(674)	(852)	(1 660)	(1 570)	(2 259)	(4 229)	(3 776)	(3 246)	(5 410)

* Trucks include mini-vans, light and heavy-duty trucks. For breakdown of light trucks, refer to "Automotive Trade" publication. Other vehicles include buses, specialty vehicles and motor homes.

Data from 1989 compiled by Industry Canada using Statistics Canada data and definitions.

Source: Statistics Canada Catalogue Numbers 65-001P and 11-001E (1965-1989).

	1989	1990	1991	1992	1993	1994	1995	1996	1997
Canadian Exports									
Cars	7	11	6	1	33	57	130	113	70
Trucks and Other Vehicles*	3	2	4	1	10	16	11	18	8
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	56	359	0	356
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	8	10	8	7
Parts	27	41	49	43	56	63	34	41	57
Tires and Tubes	1	0	4	5	10	7	8	0	1
Rubber Parts	N/A	N/A	N/A	N/A	N/A	0	0	0	0
Total	38	54	63	50	109	207	552	180	499
Canadian Imports									
Cars	2 632	2 700	2 993	3 131	2 212	1 585	1 341	1 210	2 471
Trucks and Other Vehicles*	367	323	332	384	335	226	46	186	185
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	58	0	0	8
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	225	285	195	66
Parts	905	1 195	1 239	1 353	1 622	1 277	1 305	1 364	1 154
Tires and Tubes	118	113	101	97	105	109	109	93	101
Rubber Parts	N/A	N/A	N/A	N/A	N/A	54	15	3	10
Total	4 022	4 331	4 665	4 965	4 274	3 534	3 101	3 051	3 995
Balances									
Cars	(2 621)	(2 689)	(2 987)	(3 130)	(2 179)	(1 528)	(1 211)	(1 097)	(2 401)
Trucks and Other Vehicles*	(365)	(321)	(328)	(383)	(325)	(210)	(35)	(168)	(177)
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	114	359	0	364
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	233	295	203	73
Parts	(864)	(1 154)	(1 190)	(1 310)	(1 566)	(1 214)	(1 271)	(1 323)	(1 097)
Tires and Tubes	(118)	(113)	(97)	(92)	(95)	(102)	(101)	(93)	(100)
Rubber Parts	N/A	N/A	N/A	N/A	N/A	54	15	3	10
Total	(3 984)	(4 277)	(4 602)	(4 915)	(4 165)	(3 327)	(2 549)	(2 871)	(3 496)

* Trucks include mini-vans, light and heavy-duty trucks. For breakdown of light trucks, refer to "Automotive Trade" publication.

Other vehicles include buses, specialty vehicles and motor homes.

Data from 1989 is compiled by Industry Canada using Statistics Canada data and definitions.

Source: Statistics Canada Catalogue Numbers 65-001P and 11-001E (1965-1989).

Canadian Trade in Automotive Products (Other Countries)*
(Millions of Dollars)

Table 4.5

	1965	1970	1975	1980	1985	1990	1994	1995	1996	1997
Canadian Exports										
Cars	82	66	163	407	39	147	579	977	588	405
Trucks and Other Vehicles**	10	75	258	227	187	95	369	235	192	344
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	N/A	6	32	17	28
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	N/A	2	64	20	2
Parts	32	99	180	420	307	491	1 199	1 754	1 350	1 539
Tires and Tubes	4	3	5	31	45	13	21	25	26	27
Rubber Parts	N/A	N/A	N/A	N/A	N/A	N/A	10	0	0	0
Total	128	243	606	1 085	578	746	2 186	3 087	2 193	2 345
Canadian Imports										
Cars	113	217	365	1 029	2 727	3 786	3 636	3 618	3 646	1 263
Trucks and Other Vehicles**	2	23	45	130	380	318	375	428	629	146
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	N/A	3	1	5	8
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	N/A	11	12	4	5
Parts	21	130	206	355	1 459	2 923	5 241	3 757	4 260	1 310
Tires and Tubes	2	19	82	208	207	233	310	310	271	163
Rubber Parts	N/A	N/A	N/A	N/A	N/A	N/A	4	4	2	1
Total	138	389	698	1 722	4 773	7 260	9 580	8 130	8 817	2 896
Balances										
Cars	(31)	(151)	(202)	(622)	(2 688)	(3 639)	(3 057)	(2 641)	(3 058)	(858)
Trucks and Other Vehicles**	8	52	213	97	(193)	(223)	(6)	(193)	(437)	198
Off-Highway Trucks	N/A	N/A	N/A	N/A	N/A	N/A	9	33	22	36
Trailers/Motor Homes	N/A	N/A	N/A	N/A	N/A	N/A	13	76	24	7
Parts	11	(31)	(26)	65	(1 152)	(2 432)	(4 042)	(2 003)	(2 910)	229
Tires and Tubes	2	(16)	(77)	(177)	(162)	(220)	(289)	(285)	(245)	(136)
Rubber Parts	N/A	N/A	N/A	N/A	N/A	N/A	14	4	2	1
Total	(10)	(146)	(92)	(637)	(4 195)	(6 514)	(7 394)	(5 043)	(6 624)	(551)

* Excludes U.S., Japan and Mexico

** Trucks include mini-vans, light and heavy-duty trucks. For breakdown of light trucks, refer to "Automotive Trade" publication.

Other vehicles include buses, specialty vehicles and motor homes.

Data for years following 1989 compiled by Industry Canada using Statistics Canada data and definitions.

Overall Net Production to Net Sales-Value Ratios* Achieved by Auto Pact Companies**
in Canada (Percent) Table 4.6

	Model Year										
	1965	1970	1975	1980	1985	1989	1990	1993	1994	1995	1996
Passenger Cars											
(Required Ratio: range 95-100)											
Net Sales-Value Ratio Achieved											
(All Companies)	100	161	122	106	174	138	158	197	201	244	249
Trucks and Commercial Vehicles											
(Required Ratio: range 75-100)											
Net Sales-Value Ratio Achieved											
(All Companies)	94	129	101	115	192	188	197	285	199	210	205
Buses											
(Required Ratio: range 85-100)											
Net Sales-Value Ratio Achieved											
(All Companies)	99	154	114	199	324	230	342	242	359	277	266

* Net production to net sales-value ratio of the total value of Canadian vehicle production to the total net sales value of vehicle sales for all Auto Pact companies

** Based on 18 major manufacturers

Source: Compiled from company Auto Pact reports to Industry Canada.

Canadian Value Added/Cost of Sales Achieved by Auto Pact Producers*
(Millions of Dollars)

Table 4.7

	Model Year										
	1965	1970	1975	1980	1985	1989	1990	1993	1994	1995	1996
Cost of Sales in Canada of Auto Pact Producers (All Companies)	1 534	1 891	4 545	8 757	13 022	15 402	13 244	12 907	17 425	17 535	17 750
Total Canadian Value Added (All Companies)	956	1 643	2 987	4 659	10 210	11 438	11 238	10 964	11 732	12 638	12 340
Difference between Cost of Sales and Canadian Value Added	578	248	1 558	4 098	2 812	3 964	2 006	1 943	5 693	4 897	5 410
Canadian Value Added											
<i>Total achieved Canadian Value Added as Percentage of Cost of Sales</i>	63	91	66	53	78	74	85	85	67	72	70

* Based on 18 major manufacturers

Source: Compiled from company Auto Pact reports to Industry Canada.

Total Canadian Value Added by Category of Production for the Four Major Auto Pact Vehicle Manufacturers in Canada *
(Millions of Dollars)

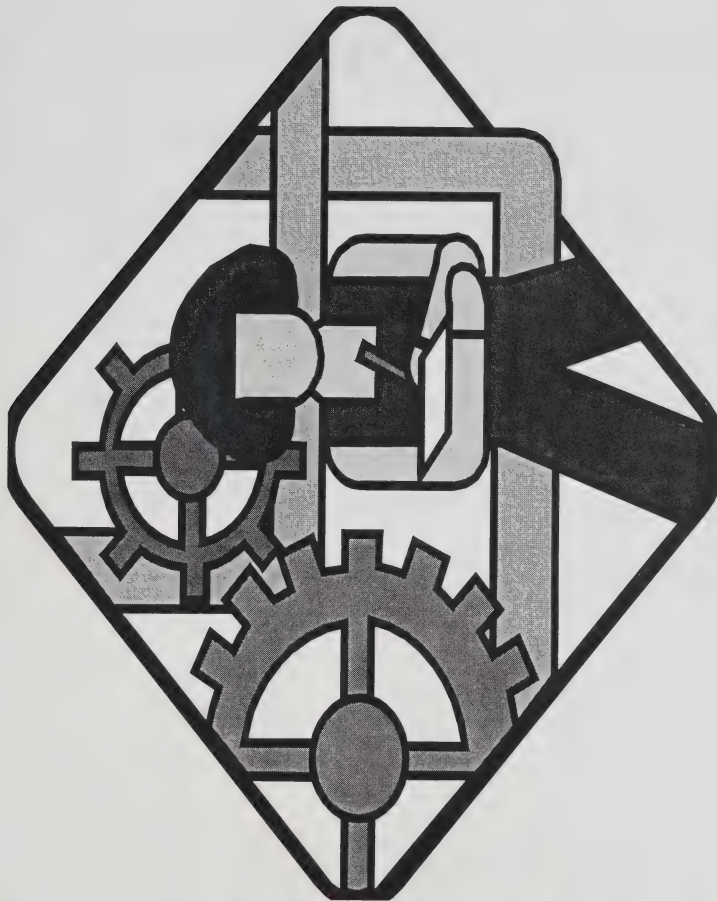
Table 4.8

	1965	1970	1975	1980	1985	1990	1993	1994	1995	1996
Non-Parts CVA ** in Vehicle Production (A)	380	483	876	1 322	2 182	3 132	3 768	3 530	3 587	4 102
Parts CVA in Vehicle Production (B)	576	510	733	1 087	3 094	3 401	3 743	3 275	3 513	4 040
CVA in Original Equipment Parts Exp.(C)	100	651	1 106	1 755	5 095	4 551	3 637	4 068	4 155	5 197
Total CVA Produced (D = A + B + C)	1 056	1 644	2 715	4 164	10 371	11 084	11 148	10 873	11 256	11 256
<i>Parts CVA as Percent of Total CVA ((B + C)/D)</i>	<i>64.0</i>	<i>70.6</i>	<i>67.7</i>	<i>68.3</i>	<i>79.0</i>	<i>71.7</i>	<i>66.2</i>	<i>67.5</i>	<i>68.1</i>	<i>68.1</i>
<i>In-Vehicle CVA as Percent of Total CVA ((A + B)/D)</i>	<i>90.5</i>	<i>60.4</i>	<i>59.3</i>	<i>57.9</i>	<i>50.9</i>	<i>58.9</i>	<i>67.4</i>	<i>62.6</i>	<i>63.1</i>	<i>63.1</i>

* General Motors, Ford, Chrysler (includes AMC before 1987) and CAMI (starting in 1989)

** Canadian Value Added

Source: 1965-1977 data prepared by the Reisman Commission; 1978-1996 data prepared by Industry Canada.



Employment

North American Employment Related to Automotive Industries
(Annual Average in Thousands)

Table 5.1

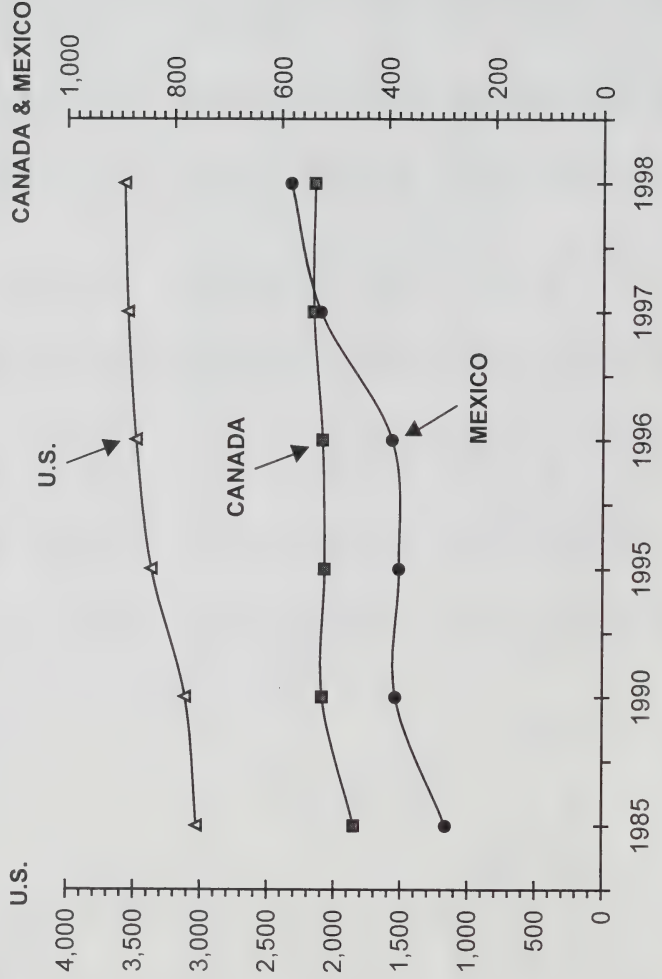
	1965	1970	1975	1980	1985	1990	1995	1996	1997	1998*
Canada										
Total Manufacturing	80	87	106	112	152	154	167	167	159	172
Motor Vehicle Assembly (SIC 323)	43	38	45	45	57	56	54	50	51	54
Truck Bodies and Trailers (SIC 324)	5	10	18	15	11	12	12	15	16	18
Automotive Parts and Accessories (SIC 325)**	32	39	43	52	84	86	101	102	92	100
Total Retail	NA	NA	NA	NA	310	368	351	355	380	365
Automotive Dealers/Distribution (SIC 631)	NA	NA	NA	NA	96	129	128	130	158	143
Aftermarket (SIC 552, 633, 634, 635)***	NA	NA	NA	NA	214	239	223	225	222	222
Total Automotive Industries	80	87	106	112	462	522	518	522	539	537
United States										
Total Manufacturing	816	773	856	853	946	869	991	1 026	1 046	1 046
Motor Vehicles (SIC 3711)	419	382	375	368	409	329	355	342	350	342
Truck and Bus Bodies (SIC 3713)	34	40	46	40	37	39	41	39	41	43
Parts and Accessories (SIC 3714)	363	351	353	350	394	400	483	528	541	547
Automotive Stampings (SIC 3465)	NA	NA	82	95	106	101	112	117	114	114
Total Retail	522	613	1 735	1 740	2 080	2 244	2 376	2 457	2 500	2 527
Automotive Dealers (SIC 551)	NA	NA	731	745	856	924	1 002	1 032	1 051	1 048
Aftermarket (SIC 501, 554, 7538)****	522	613	1 004	995	1 224	1 320	1 374	1 425	1 449	1 479
Total Automotive Industries	1 338	1 386	2 591	2 593	3 026	3 113	3 367	3 483	3 546	3 573
Mexico										
Vehicle manufacturers	NA	NA	NA	NA	54	53	53	45	61	62
Components industry	NA	NA	NA	NA	129	174	145	151	240	246
Dealer network	NA	NA	NA	NA	65	69	52	57	68	87
Maquiladoras	NA	NA	NA	NA	43	89	129	139	157	187
Total Automotive Industries	0	0	0	0	291	385	379	392	526	582
Total North American Employment	1 418	1 473	2 697	2 705	3 779	4 020	4 264	4 397	4 611	4 692

* Figures for manufacturing are Survey of Earnings, Payroll and Hours (SEPH). Previous years are from the Census of Manufacturers
 ** Includes aftermarket manufacturing
 *** Includes wholesale and retail stores, service stations and repair shops
 **** Includes SIC 501 and 554 for 1972-1981 and SIC 554 only 1965-1971

Source: Statistics Canada Catalogue Number 42-251B (up to 1986), 31-203
 (1986 and subsequent years), and 72-002; U.S. Bureau of Labor Statistics; Secofi

North America Employment in Automotive Industries
(Annual Average)

Graph 5.1





Automotive Plants in Canada

Major Motor Vehicle Assembly Plants in Canada

Table 6.1

<i>Company/Plant Name</i>	<i>Location</i>	<i>Products</i>
Light Vehicle Manufacturers		
Canadian Automobile Mfg. Inc. (CAMI) http://www.cami.ca/start.htm	Ingersoll, Ontario	Suzuki Swift, Suzuki Vitara, Chevrolet Tracker
DaimlerChrysler Canada Ltd. http://www.daimlerchrysler.ca/	Bramalea, Ontario	Concorde, Dodge Intrepid, LHS, 300M
	Windsor, Ontario	Dodge Caravan, Grand Caravan, Plymouth Voyager, Grand Voyager
	Windsor, Ontario (Pilette Road)	Dodge Ram, Ram wagon
Ford of Canada Ltd. http://www.ford.ca/fordFlash.html	Oakville, Ontario	Windstar, F series
	Oakville, Ontario	F series
	St. Thomas, Ontario	Crown Victoria, Mercury Grand Marquis
Honda Canada Manufacturing Inc.	Alliston, Ontario	Acura EL, Civic, Acura MD-X (Spring 2000)
	Alliston, Ontario	Odyssey
General Motors of Canada Ltd. http://www.gmcanada.com/english/home/home.html	Oshawa, Ontario	Lumina, Monte Carlo, Impala (2000 model)
	Oshawa, Ontario	Century, Regal, Impala (2000 model)
	Oshawa, Ontario	GMC Sierra (extended cab), Silverado (extended cab)
	Sainte-Thérèse, Quebec	Camaro/Firebird
	Cambridge, Ontario	Corolla
Toyota Motor Manufacturing Canada Inc. http://www.toyota.ca/toyota/homeE.html	Cambridge, Ontario	Lexus RX-300 (Summer 2000)
Heavy-Duty Truck Manufacturers		
Navistar International Corporation Canada http://www.navistar.com/	Chatham, Ontario	Heavy-duty trucks

Major Motor Vehicle Assembly Plants in Canada

Table 6.1

Sterling Truck (Division of Freightliner of Canada Ltd.) http://www.sterlingtrucks.com/	St. Thomas, Ontario	Heavy-duty trucks
Western Star Trucks Inc. http://www.westernstarholdings.com/	Kelowna, British Columbia	Heavy-duty trucks
Bus Manufacturers		
Canadian Bluebird Coach Ltd.	Brantford, Ontario	School buses
DaimlerChrysler Canada Ltd. http://www.daimlerchrysler.ca/	Windsor, Ontario	Mini-buses (10-15 passengers)
Entreprises Michel Corbeil http://www.paiauto.com/kw/	Ville de Laurentide, Quebec	School buses
Girardin Inc. http://girardin.com/indexA.htm	Drummondville, Quebec	Mini school buses
Novabus http://www.novabus.com/index-e.htm	Saint-Eustache, Quebec	Urban transit buses
Motor Coach Industries Ltd. http://www.motorcoach.ca/	Winnipeg, Manitoba	Highway buses
New Flyer Industries Ltd. http://www.newflyer.com/	Winnipeg, Manitoba	Urban transit buses
Orion http://www.transit-center.com/Orion/	Mississauga, Ontario	Urban transit buses
Prévost Car Inc. http://www.prevoستcar.com/	Sainte-Claire, Quebec	Highway buses
Thomas Built Buses of Canada http://www.thomasbus.com/index.html	Woodstock, Ontario	School buses

Source: Compiled from information supplied by companies.

New Entrant Assembly Investment in North America

Table 6.2

Company	Location	Announced Capacity (Thousands)	Date Open	Products
Canada				
CAMI*	Ingersoll, Ontario	200	1989	Geo Metro, Swift, Sunrunner, Geo Tracker, Sidekick, Vitaro
Honda	Alliston, Ontario Alliston, Ontario	170 180	1986 1999 2000	Civic (3 dr. hatchback), Acura 1.6 EL Odyssey MX-D
Toyota	Cambridge, Ontario Cambridge, Ontario	150 120	1988 1998 2000	Corolla Solara (ends summer 2000) Lexus RX3000 (summer 2000)
U.S.				
Auto Alliance**	Flat Rock, Michigan	180	1987	626 Mazda, Mercury Cougar
BMW	Spartanburg, North Carolina	85	1995	Z3, M coupe
Honda	Marysville, Ohio Liberty, Ohio	383 220	1982 1991	Accord, Acura TL8 Civic, Acura CL
Mercedes-Benz	Tuscaloosa, Alabama	70	1998 1999	ML 320 ML 430
Mitsubishi	Bloomington-Normal, Illinois	240	1988	Eclipse, Avenger, Galant, Sebring
NUMMI***	Fremont, California	228 150	1984 1991	Corolla, Prizm Tacoma

* Joint venture with General Motors

** Joint venture with Ford

*** Joint venture with Toyota

New Entrant Assembly Investment in North America

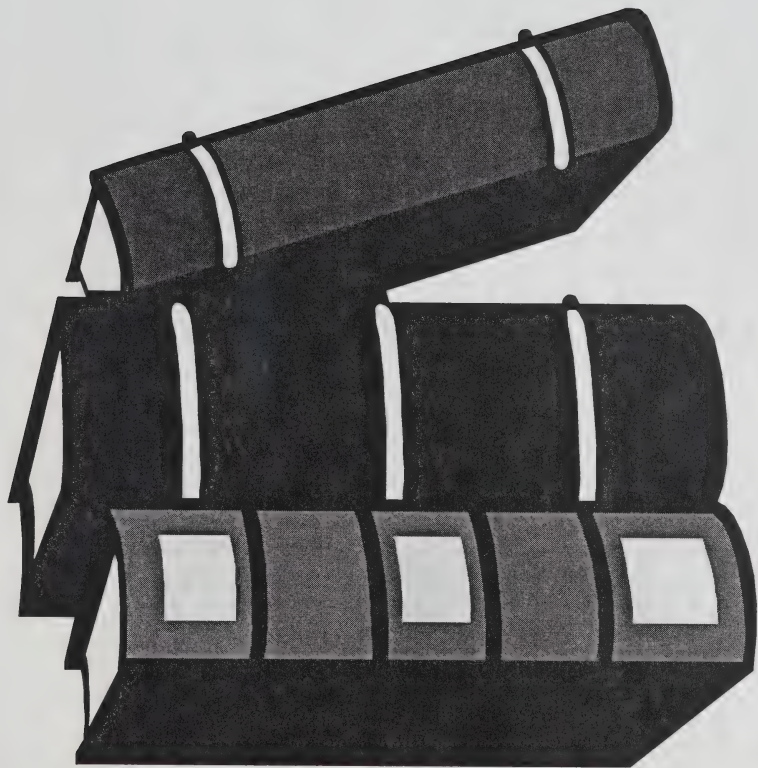
Table 6.2

Company	Location	Announced Capacity (Thousands)	Date Open	Products
Nissan	Smyrna, Tennessee	327	1983	Altima
	Smyrna, Tennessee	200	1992	Frontier pickup, xterra (2000 model)
	Avon Lake, Ohio (Ford)	110	1992	Nissan Quest, Mercury Villager
Saturn Corp.	Spring Hill, Tennessee	300	1991	Saturn coupe, sedan and wagon
SIA (Subaru/Isuzu)	Lafayette, Indiana	220	1989	Legacy cutback Honda Passport, Isuzu Amigo
Toyota	Georgetown, Kentucky	200	1993	Camry
	Georgetown, Kentucky	200	1988	Avalon
	Georgetown, Kentucky	100	1998	Sienna minivan (moves to Princeton model year 2000)
	Princeton, Indiana	100 50	1998 2000	Tundra SUV
Mexico				
BMW	Toluca, Mexico	4	1995	Porsche 911, 3 and 5 series sedans
Honda	El Salto, Mexico	15	1995	Honda Accord
Mercedes Benz	Tianguisteuco, Mexico	4	N/A	E, S class cars Medium trucks
Nissan	Aguascalientes, Mexico	155	1993	Lucino, Sentra, Tsuru, Tsubame wagon
	Cuernavaca, Mexico	135		Frontier pickup
Volkswagen	Puebla, Mexico	360	1992	Beetle, New Bretle Golf, Jetta

* Joint venture with General Motors

** Joint venture with Ford

*** Joint venture with Toyota



Glossary

Aftermarket (Replacement Market) - all products and services used in the repair and maintenance of vehicles.

Aftermarket part - goods not for use as original equipment in the production of light-duty vehicles or heavy-duty vehicles, i.e. products and services used in the repair and maintenance of these vehicles.

Agent or broker - an intermediary with legal authority to operate on behalf of the manufacturer.

American Automobile Labelling Act (AALA) - regulations requiring vehicle manufacturers to include content information on vehicle labels for cars and trucks for sale in the U.S. after October 1, 1994.

Anti-lock braking system (ABS) - System that automatically controls wheel slip or prevents sustained wheel-locking on braking.

Asia Pacific Economic Cooperation (APEC) - An organization established in 1989 to promote trade and investment in the Pacific Basin. APEC now comprises eighteen countries located in and around the Pacific Ocean: Australia, Brunei, Canada, Chile, China, Hong Kong, Indonesia, Japan, Malaysia, Mexico, New Zealand, Papua New Guinea, the Philippines, Singapore, South Korea, Taiwan, Thailand, and the United States.

Association of South East Asian Nations (ASEAN) - an organization of states (including Brunei, Myanmar, Burma, Indonesia, Laos, Malaysia, the Philippines, Singapore, Thailand, and Vietnam) founded in 1967 to present an united front that addresses the political, economic, and strategic dynamics of the region.

Auto Pact base year - With respect to the Auto Pact, the 12 month period beginning on August 1, 1963, and ending on July 31, 1964.

Auto Pact Canadian value added - the aggregate of the costs of parts, material, labour costs, and transportation costs that are reasonably attributed to the production of vehicles or parts by manufacturers producing vehicles in Canada.

Automated Guided Vehicle System (AGVS) - vehicles equipped with automatic guidance equipment which follow a prescribed path, stopping at each machining or assembly station for manual loading and unloading of parts.

Autodealership or auto dealer - a retail outlet that carries one (or in some cases in the U.S., a number of) manufacturer's product line and sells to general consumers and fleet operators. The outlet will also provide service and sell parts for the brand of vehicle that it carries. In some instances, a dealer may dual for another manufacturer's product line.

Automobile - four-wheeled passenger motor vehicle having a seating capacity for not more than 10 people including police cars and racing cars but not including ambulances or hearses.

Auto parts store - jobber and retail auto parts stores which primarily sell automotive products and conduct business at the retail level.

Average weekly earnings - gross taxable payrolls divided by the number of employees.

Big Three - General Motors, Ford and Chrysler.

Glossary of Automotive Terms

Body shop - service outlet specializing in vehicle body repair work.

Bus - passenger motor vehicle or chassis having a seating capacity for more than 10 people.

Buying decisions - the act of determining whether or not a product purchase or repair, will be made, and/or which product or service will be purchased.

Canada-U.S. Free Trade Agreement (FTA) - Implemented in January 1989 to eliminate all tariffs on U.S. and Canadian goods by January 1998 and to reduce or eliminate many non-tariff barriers.

Canadian Automotive Repair and Service Council (CARS) - a not-for-profit organization established to serve the human resource and training needs of the Canadian car and truck repair and service industry.

Canadian cross border shopping - cross border shopping describes the purchasing by Canadian consumers of products in the United States. Of particular interest is the decision by these buyers to obtain their products in the U.S., even though similar products are available in the Canadian market.

Canadian Environmental Protection Act (CEPA) - act where the goal is to pollution prevention and protection of Canadians from toxic substances.

Capacity - maximum production attainable under normal conditions. With regard to normal conditions, the company's operating practices are to be followed with respect to the use of production facilities, overtime, workshifts, holidays, etc.

Capital Expenditures - expenditures to acquire or add to capital assets that will yield benefits over several accounting periods. Included are cost of procuring, construction, installing new durable plants, machinery and equipment where for replacement, addition or for lease or rent to other companies including subsidies.

Captive Import - an imported motor vehicle or part manufactured by another automaker usually for sale under the brand name of the importer.

Casting - a process technology that delivers a liquid molten metal into a purpose-built mould. After cooling, the solid metal surface has the shape of the mould cavity.

Census value added - residual representing the difference between the value of goods and industrial services produced and the direct material costs associated with the production of goods.

Changeover - the refitting of equipment to either neutralize the effects of the just completed production or to prepare equipment for production of the next scheduled item, or both.

Climate Change - the international concern that increasing concentrations of greenhouse gases (GHGs) in the atmosphere are changing the climate in ways detrimental to our social and economic well-being.

Component - a raw material, ingredient, part or subassembly that at goes into a higher level assembly, compound, or other item.

Component assembly - a combination of two or more parts or sub-components to form an assembly.

Glossary of Automotive Terms

Component Design - the activity for the design of specific components including responsibility for material, cost, weight, reliability, durability, function, appearance, serviceability.

Concept Vehicle - a current production vehicle modified for installation of new design concepts for evaluation of environmental functional feasibility.

Consumer factors - demographic characteristics of consumers including age, gender, income and geographic location, afford ability.

Corporate Average Fuel Economy (CAFE) - regulation enacted in 1975 which requires a motor vehicle manufacturer to classify its U.S. vehicle fleet sales as either domestic or import for the purpose of fuel economy averaging.

Cost of production - actual cost to the manufacturer of producing a vehicle (does not include mark-up).

Customs duties - customs duties levied on imported goods under the Customs Tariff.

Days' Supply - number of days needed to sell all vehicles in inventory, based on the previous month's sales rate.

Dealer - a firm that buys and sells, adding some value for the consumer in the process. Dealer often means a firm which operates closer in the distribution channel to the consumer than a distributor or wholesaler, and may add more value for consumers than either of the above-mentioned terms.

Dealer principal - the individual or corporation that owns and controls one or a number of auto dealerships.

Die - solid or hollow form used for shaping materials by stamping, pressing, extruding, drawing or threading.

Diffusion - the way in which innovations spread through market or non-market channels.

Distributor - synonymous with wholesalers; distributors perform many of the same functions as wholesalers, such as selling, physical distribution, credit, etc. Some industries use the term distributor instead of wholesaler.

Distribution channel - is the path goods take as their title transfers from producer to consumer. The title transfer for consumer goods is usually accompanied by transfer of the physical goods, as well.

Do-it-Yourself Market (DIY) - the vehicle maintenance and repairs conducted by the vehicle owner or friend/relative who purchase auto parts from a retail outlet.

Domestic - a vehicle produced in Canada, United States or Mexico.

Door rates - the hourly rates charged by dealers on standardized units of service work. Hourly rates may or may not correspond to an actual hour of work.

Duty drawback - import duties or taxes repaid by a government in whole or in part, when the imported goods are re-exported or used in the manufacture of exported goods.

Duty paid value - in respect to imported goods, is the aggregate value for duty on imported goods.

Duty waiver - forgiveness, in whole or in part, of import duties when certain conditions are met.

Glossary of Automotive Terms

Electric Vehicle - cars, buses, vans or trucks which use dedicated or hybrid electric systems as their power source.

Employment - total employment in each manufacturing facility, including total manufacturing employees, total support staff, and total engineering/R&D staff. Production workers relate to the average number actually engaged in the manufacturing process. Administrative and non-manufacturing includes employees at head offices and sales offices.

Employee Benefits - the provision of direct (salary, bonuses, etc.) indirect (vacation leave, medical and dental plans, etc.) and deferred employee compensation (pensions, etc.)

Establishment - smallest operating entity producing a homogenous set of goods and services and is capable of reporting full range of production account variables to calculate "value added".

Free Trade Agreement of the Americas (FTAA) - an effort to unite the economies of the Western Hemisphere into a single free trade arrangement. The Heads of State of the 34 democracies in the region agreed to construct a "Free Trade Area of the Americas" and to complete negotiations for the agreement by 2005.

Finance & control - ownership of company (ie. Canadian, U.S., Japanese, German, etc.); public or private; capital investments: buildings, machinery and equipment, tooling programs

Firm - a business or institution comprising sole proprietorships, partnerships, companies and other forms of organizations.

Fixed or One Price Selling - published fixed price displayed on a new vehicle eliminating need for negotiation with the dealer.

Fixture - device for holding goods in process while working tools are in operation that does not contain any special arrangements for guiding the working tools.

Fleet sales - the purchase of vehicles by a business that meet a minimum requirement of units sold.

Forecast - prediction of future production or sales in the automotive industry.

Forging - a process that transforms solid metal into shapes of varying cross-sectional material thickness, often involving heating.

Franchise - establishment that has the right to exercise the powers of a corporation.

G7 (Group of Seven) - Seven industrial countries consisting of the United States, Japan, Germany, France, the United Kingdom, Italy and Canada, whose leaders have met at annual economic summits since 1975 to coordinate economic policies.

General Agreement on Tariffs and Trade (GATT) - Signed in 1947, the GATT was formal multilateral agreement aimed at expanding and liberalizing world trade. The World Trade Organization which is the successor to the GATT came into existence on January 1, 1995.

Generalized Preferential Tariff (GPT) - system of non-reciprocal tariff preferences for the benefit of developing countries. It grants duty-free or preferential entry to imports for eligible developing countries up to a certain dollar value or import percentage limit.

Greenhouse gases (GHGs) - group of gases which individually act to trap solar energy near the earth. GHGs for which emission levels

have been estimated are carbon dioxide(CO₂), methane (CH₄), nitrous oxide (N₂O), sulphur hexafluoride (SF₆), carbon tetrafluoride (CF₄), carbon hexafluoride (C₂F₆) and hydro fluorocarbons (HFCs).

Grey market - the grey market describes the purchase by intermediaries of product which is not supplied to them by the "authorized" distribution channel of the supplier. Thus, a warehouse club in Canada that sells a stereo bought in the U.S. or elsewhere from other than the manufacturer is supplying grey market goods. While grey market products are frequently the same as would be available from conventional channels in Canada, the grey market assumes responsibility for service or repair where the manufacturer declines this support.

Gross Vehicle Weight (GVW) -Maximum legal weight at which a vehicle can be operated.

Heavy-duty truck - vehicle weighing from 26,001 to 33,001 lbs. Also included off-highway trucks.

Ignition System - Electrical system devised to produce timed sparks from engine spark plugs. Consisting of a battery, induction coil, capacitor, distributor, spark plugs and relevant switches and wiring.

Importer - an organization that typically operates at arms length or under contractual agreement with manufacturers to bring products made in another country into Canada

Import Nameplate - vehicles sold by manufacturers primarily located outside North America whether assembled Overseas or in North America

Independent Repair Shop - small service outlet offering specialized repair services. They usually do not sell gasoline

Intellectual Property Rights (IPR) - the right to possess or control the use of intellectual property, such as trademarks, copyrights, patents and trade secrets.

Interchannel competition - rivalry between different channels of the distribution system. For example, independent retailers competing with manufacturers' outlets.

Intermediary - firm or organization that operates between the producer of the goods and the end purchaser. Thus, the members of the distribution channel noted above are intermediaries or "middlemen".

Intrachannel competition - rivalry between channel participants at the same level in the distribution channel. For example, department stores competing with one another.

Inventories - book value of inventory owned and held in Canada.

Jigs - device used in the accurate machining of good in process by holding the goods firmly and guiding tools exactly to position.

Joint venture - an international business collaboration between foreign interests and private parties from a host country in which two or more parties establish a new business enterprise to which each contributes and where ownership and control are shared.

Just-in-Time (JIT) - refers to the movement of material to the necessary place at the necessary time. It is part of a business philosophy based on achieving excellence in a manufacturing company through the continuous elimination of waste.

Kaizen activities - activity through which continuous improvement is sought.

Glossary of Automotive Terms

Kyoto Protocol - international agreement among industrialized countries negotiated in Kyoto, Japan in December 1997 to reduce greenhouse gas emissions. Canada committed to reduce its greenhouse gas emissions by 6 percent of 1990 levels between 2008 and 2012.

Lease - form of contract transferring the use of a vehicle in consideration of payment.

Light truck - vehicle weighing less than 14,000 lbs.

Light vehicles - passenger cars and light trucks.

Loss Leader - products whose prices are cut with the idea that they will attract customers to the store.

Make - brand name of a car or truck (i.e. Chevrolet, Ford, Dodge, Honda)

Manufacturer's Suggested Retail Price (MSRP) - Dealers typically sell at a discount to this price.

Machining - an operation which shapes metal parts by carving away excess material as chips produced in a sequential process of turning, milling and grinding operations

Manufacturing - process technology (ie. metal forming, machining, injection moulding, blow moulding, die casting, forgings, electronics/electrical, assembly, coating/plating); capacity utilization (in percent); production volumes; strategic alliances (eg. joint ventures, technology agreements)

Market share - the percentage of total sales represented by an individual manufacturer/importer, make or nameplate.

Margin or gross margin - the return an intermediary achieves on the selling price of the article. That is, if the intermediary buys a product for \$1 and sells it for \$1.50, the margin is calculated. For example, .50 divided by \$1.50, or 33%.

Mark-up - Mark-up is the return an intermediary achieves on the cost price of an article. Using the same example described above, mark-up is .50 divided by \$1, or 50%.

Maquila (maquiladora) - Mexican assembly plant located near the U.S.-Mexican border where most production is exported to the United States.

Mechanic installed market (MIL) - vehicle maintenance and repair conducted by a mechanic/professional at a service outlet.

Medium-duty truck - vehicle weighing from 14,001 to 26,000 lbs.

Mercosur - the southern cone common market of Argentina, Brazil, Paraguay and Uruguay. Mercosur enacted a common external tariff on January 1, 1995 for almost 85 percent of tariff items of the four countries; most trade among members will be duty-free.

Metal forming - solid metal and molten metal process such as casting, forging, stamping and machining.

Methylcyclopentadienyl Manganese Tricarbonyl (MMT) - organic manganese compound used as a fuel additive to enhance octane levels in gasoline

Model line - group of motor vehicles having the same platform or model name.

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Model name - word, group of words, letter, number or similar designation assigned to a motor vehicle by a marketing division of a motor vehicle assembler.

Most-Favoured-Nation (MFN) Treatment - one country's commitment to extend to another country the lowest tariff rates that it applies to any third country.

Motor Vehicle Safety Act (MVSA) - act which regulates the manufacture and importation of motor vehicles and motor vehicle equipment to reduce risk of death, injury and damage to property and the environment.

Mould - hollow form, matrix or cavity into which materials are placed to produce goods of desired shapes.

North American Industrial Classification System (NAICS) - industry classification between Canada, the United States and Mexico to increase compatibility of data with these countries. The classification is based on establishment rather commodity. This classification system will be implemented with reference to year 1997 and data will be available in 1999.

Net sales value - the selling price received by the manufacturer for the vehicle including the cost of transporting the vehicle in Canada (includes mark-up).

New car dealer - major car dealership with a parts and service operation.

North American Free Trade Agreement (NAFTA) - Agreement creating free trade among the United States, Canada and Mexico. The NAFTA went into effect on January 1, 1994.

North American produced - motor vehicles assembled in Canada, the United States or Mexico.

Off-Highway Vehicle - Vehicle intended for operation on unmade surfaces or rough terrain (i.e. for construction or agriculture).

On Board Diagnostics (OBD) - a unit that monitors the Electronic Control Unit and system responses for errors during normal vehicle operations. When the vehicle is serviced, this information on the errors can be down loaded and displayed to the service personnel which will facilitate the trouble shooting process.

Operating profit - pre-tax earnings after deducting all operating expenses from gross margin.

Organization for Economic Co-operation and Development (OECD) - an organization whose purpose is to provide its 29 Member countries with a forum in which governments can compare their experiences, discuss the problems they share and seek solutions which can then be applied within their own national contexts. Each member country is committed to the principles of the market economy and pluralistic democracy.

Outlet - synonymous with vehicle dealership.

Overcapacity - the situation where maximum global production of automobiles exceeds the total global demand for automobiles.

Overtime - includes pay received for the number of hours worked in excess of the standard workday or workweek.

Partnership for a New Generation of Vehicles (PNGV) - established in 1993, this partnership, between the United States Federal Government and the automotive industry, was founded to establish

Glossary of Automotive Terms

global technical leadership in the development and production of affordable, fuel-efficient, low emission vehicles that meet today's performance standards.

Passenger vehicle - four wheeled motor vehicle that also includes mini-vans and sport utility vehicles.

Plastic moulding - a process that converts organic-based materials, by means of a general-purpose press and purpose-built tooling under controlled heat and pressure, and injects the hot material into a die cavity shaped in the final form of the intended part.

Platform - primary load-bearing structural assembly of a motor vehicle determining the basic size of the motor vehicle, and is the structural base that supports the drive line and links the suspension components of the motor vehicle.

Process Innovation - a significant change in the technology of the production of an item which may involve new equipment, new management and organization methods.

Product Innovation - commercialization of a technologically changed product, whose design characteristics are changed in ways which deliver new or improved services to the consumer.

Pneumatic Tire - Flexible, hollow rubber forming the outer part of the vehicle wheel and inflated by air pressure.

Product design - the process of planning the product's specifications.

Product testing - rigorous methods whereby a product's quality and durability are measured.

Product planning - a function whereby an enterprise is responsible for the efficient, planning, scheduling and coordination of production activities.

Production engineering - planning and control of the mechanical means of changing the shape, condition of materials toward greater effectiveness and value.

Productivity - relative measure of output per labour and/or machine output.

Program cars - automobiles sold by manufacturers for fleet use. Usually applies to very large fleets, such as those of car rental companies.

Program Objectives - A consensus of what has been determined to be the most marketable product for a given model year.

Purchasing - total materials purchased for manufacturing/assembly into auto parts (ie. steel, plastics, rubber, textiles, etc.)

QDC - quick die change

Quality - conformance to requirements in relation to a degree of excellence.

Refit - closure of a plant for the purpose of plant conversion or retooling.

Registration - motor vehicle ownership that is filed with the province/state.

Research & development - R&D expenditures (product and process development)

Glossary of Automotive Terms

SAE - Society of Automotive Engineers

Sales - total automotive product sales (vehicles, automotive parts, including OE and aftermarket)

Scientific Research and Experimental Development (SR&ED) Program - incentive for industrial research and development in Canada which allows individuals and companies to deduct 100 percent of qualified current SR and ED expenditures and capital SR and ED expenditures.

Scrappage - a vehicle registered in the previous year but not re-registered in the current year.

Service station - outlets which sell gasoline and are operated by the major oil companies

Shipments (value of) - summation of value of shipments produced by establishment, receipts of custom and repair revenue

Special Import Measures Act (SIMA) - legislation that helps to protect Canadian producers from harm or injury caused by the dumping of goods into Canada by foreign exporters or the subsidizing of goods by foreign governments.

Special services - a category that describes plants which add value to automotive parts manufactured by others by using process such as painting, plating, heat treatment, etc.

Specialty repair shop - retail outlet which offers specialized vehicle products and service

Stamping - a process technology which manufactures automotive parts by shaping rolled sheet metal or by bending or stretching it in a sequence of purpose-built tools fitted to a general purpose press.

Standard Industrial Classification (SIC) - industry class that represents a level of organization of production by type of specialization. Currently the 1980 Standard Industrial Classification is in effect identifying each industry at the 4 digit level. In 1997, the North American Industrial Classification System (NAICS) comes into effect.

Standard Work Week - average number of hours worked normally scheduled in a work week.

Subsidiary - a subsidiary is an organization operating in Canada that is owned or controlled by a foreign company which may or may not manufacture in Canada.

Supplier Cost Reduction Effort (SCORE) - a United States program that urges suppliers to develop processes to cut costs. Suppliers are allowed to keep half the savings and pass on the other half to the automakers.

SUV - Sports Utility Vehicle

Tariff - A duty or tax imposed on imports

Tier 1 Supplier - manufacturer to the vehicle assemblers who are responsible for delivery of the finished assembly, product development and continued technology renewal.

Tier 2 Supplier - producer of parts providing value-added to minor sub-assembly

Glossary of Automotive Terms

Tier 3 Supplier - supplier of engineered materials and special services, such as rolls of sheet steel, bars and heat treating, surface treatments.

Tire store - retail outlet selling tires and offering vehicle repair services.

Total Quality Management (TQM) - A management technique to improve the quality of goods and services, reduce operating costs and increase customer satisfaction.

Tool - device for use in, or attachment to, production machinery that is for the assembling of materials or the working of materials by turning, milling, grinding, polishing, drilling, punching, boring, shaping, shearing, pressing or planing.

Tooling - set of required standard or special tools needed to produce a particular part; includes jigs, fixtures, gages and cutting tools, but excluding machined tools.

Trim Level - vehicle designation assigned by vehicle manufacturers that represent specific equipment packages.

Used vehicle - vehicle that has been previously owned or driven.

United States Council for Automotive Research (USCAR) - an organization founded by Chrysler, Ford, and General Motors to strengthen the technology base of the domestic automotive industry through research and co-operation.

VA - Value analysis

VE - Value engineering

VER - Voluntary export restraint in relation to Japanese manufacturers exporting to Canada (no longer in effect).

VRA - Voluntary restraint agreement in relation to Japanese manufacturers exporting to the United States (no longer in effect).

Vehicle Identification Number (VIN) - Number assigned to a vehicle by the manufacturer primarily for registration and identification purposes (consisting of numerals and letters).

Windsor Experiment - Chrysler Canada, in partnership with government and educational institutions, has launched a number of initiatives collectively referred to as the Windsor Experiment. The Windsor Experiment conducts studies to benchmark "best practice" training and education in Europe, and applied the results in various skills development programs.

World Trade Organization (WTO) - Created by the Uruguay Round and successor to the GATT, this new organization began operations on January 1, 1995.

Wholesaler - an intermediary which sells to other intermediaries, such as a firm that buys from a manufacturer and sells to a retailer.

Glossary of Automotive Terms

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E-mail: caw@caw.ca
Web site: www.caw.ca

Canadian Automobile Dealers Association of Canada

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Canadian Plastics Industry Association

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Canadian Vehicle Manufacturers' Association

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Japan Automobile Manufacturers' Association of Canada

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Fax: (416) 968-7095
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Rubber Association of Canada (The)

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Tel.: (905) 270-8322
Fax: (905) 270-2640
E-mail: rac@inforamp.net

Used Car Dealers Association of Ontario

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4174 Dundas Street West
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Fax: (416) 232-0775
Web site: www.ucda.org

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<i>Canadian Economic Observer Historical Supplement</i> — Catalogue Number 11-210-XPB	<i>New motor vehicle sales</i> (monthly) — Catalogue Number 63-007-XPB
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Associations de l'industrie de l'automobile

Association of International Automobile Manufacturers of Canada

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Used Car Dealers Association of Ontario

Suite 205
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Tel.: 1-800-268-2598
Fax: (416) 232-0775
Web site: www.ucda.org

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Glossaire de termes de l'automobile

Véhicule d'origine nationale - un véhicule produit au Canada, aux États-Unis ou au Mexique.

Véhicule électrique - Automobile, autobus, fourgonnette ou camion utilisant comme source de propulsion un système électrique ou hybride.

Véhicules légers - Voitures particulières et camions légers.

Véhicule particulier - Véhicule automobile à quatre roues qui comprend aussi les mini-fourgonnettes et véhicules utilitaires sportifs.

Vente à prix fixe ou unique - vente où un prix fixe est affiché sur une voiture neuve, de sorte qu'aucune négociation n'est nécessaire.

Ventes - Ventes totales de produits automobiles (véhicules, pièces automobiles, y compris les marchés de l'équipement d'origine et secondaire).

Ventes de parc - Achat de véhicules par une entreprise qui satisfait à une exigence minimum d'unités vendues.

VUS - véhicule à utilisation sportive

Zone franche - Endroit où des marchandises sont importées pour y subir une transformation. Les droits de douane ne sont payés que sur les articles importés. Ils sont habituellement moins élevés que pour les produits finis et ne sont perçus qu'au moment de la vente.

Surcapacité - situation où la production générale d'automobiles dépasse le total de la demande générale.

Système de classification des industries de l'Amérique du Nord (SCIAN) - classification des industries du Canada, des États-Unis et du Mexique, afin d'accroître la compatibilité des données entre ces pays. La classification est fondée sur l'entreprise et non sur le produit. Ce système de classification sera mis en oeuvre avec 1997 comme année de référence et les données seront disponibles en 1999.

Système intelligent véhicule-route (SIV-R)

Systèmes de véhicules à guidage automatique (SVGA) - Véhicules dotés d'un dispositif de guidage automatique, conçus pour suivre un circuit prédéterminé et arrêter à chaque poste d'usinage ou d'assemblage pour le chargement ou le déchargement manuel de pièces.

Taux fixe - Taux horaire demandé par les concessionnaires pour la réalisation de travaux d'entretien courants. Ce taux peut ou non correspondre à une heure réelle de travail.

Temps supplémentaire - Rémunération versée pour les heures travaillées en dehors de la journée ou de la semaine de travail normale.

Trois grands - General Motors, Ford et Chrysler.

United States Council for Automotive Research (USCAR) - organisme fondé par Chrysler, Ford et General Motors dans le but de renforcer la base technologique de l'industrie américaine de l'automobile par la recherche et la coopération.

USCAR-United States Council for Automotive Research - Consortium parapluie constitué des sociétés Chrysler, Ford et General Motors dont le but est de surveiller les activités des actuels consortiums de recherche.

Usinage - Façonner une pièce de métal par enlèvement de copeaux au cours d'un processus séquentiel : tournage, fraisage et meulage.

Valeur à l'acquitté - La valeur totale en douane des marchandises importées.

Valeur ajoutée recensée - Valeur résiduelle représentant la différence entre la valeur des biens ou services industriels produits et les coûts directs du matériel liés à la production.

Valeur marchande nette - Prix de vente obtenu par le fabricant pour un véhicule, ce qui comprend les frais de transport du véhicule au Canada (et la majoration). Véhicule électrique- Automobile, autobus, fourgonnette ou camion utilisant comme source de propulsion un système électrique ou hybride.

Valeur résiduelle - Valeur estimée d'un véhicule à la fin d'une période de location. Dans un crédit-bail simple, le client a la possibilité d'acheter l'automobile à la fin de la période de location pour le montant correspondant à sa valeur résiduelle. Le calcul tient compte de la dépréciation du véhicule sur la période de location et la valeur est exprimée en pourcentage du prix de détail.

Véhicule concept - véhicule de production courante qui a été modifié pour y installer de nouveaux concepts de design, afin d'évaluer sa faisabilité fonctionnelle et environnementale.

Véhicule d'occasion - Véhicule qui a appartenu à quelqu'un d'autre ou qui a déjà roulé.

Glossaire de termes de l'automobile

Production juste-à-temps (JAT) - Mouvement du matériel vers l'endroit voulu au bon moment. Cette méthode fait partie d'une philosophie d'entreprise visant l'atteinte de l'excellence dans une entreprise de fabrication par l'élimination continue du gaspillage.

Production rationnelle - Philosophie de production qui prône une utilisation minimale de ressources dans l'exploitation d'une entreprise.

Productivité - Mesure relative de la production par rapport au facteur travail ou au facteur machines, ou les deux.

Produit en Amérique du Nord - Véhicules automobiles assemblés au Canada, aux États-Unis ou au Mexique.

Programme du crédit d'impôt pour la recherche scientifique et le développement expérimental (RS-DE) - Ce programme offre des mesures incitatives généreuses concernant la recherche et le développement industriels au Canada. Il permet aux chercheurs et aux entreprises de déduire la totalité des dépenses courantes admissibles en RS-DE ainsi que les dépenses en capital pertinentes.

Protocole de Kyoto - accord international négocié à Kyoto, au Japon, en décembre 1997 par des pays industrialisés dans le but de réduire les émissions de gaz à effet de serre. Le Canada s'est engagé à réduire entre 2008 et 2012 ses émissions de gaz à effet de serre de 6 p. 100 par rapport aux niveaux de 1990.

Prix de vente au détail suggéré par le fabricant (PVDSF) - Les concessionnaires vendent habituellement leurs produits à un prix inférieur à ce prix.

Qualité - Conformité aux exigences en fonction du degré d'excellence.

RVE - Restriction volontaire des exportations touchant les fabricants japonais exportant au Canada (déormais plus en vigueur).

Réaménagement - Fermeture d'une usine à des fins de conversion ou de réoutillage.

Recherche et développement - Dépenses en R-D (développement de produits et de procédés).

Rémunération globale des employés - Avantages directs (salaire, primes, etc.), indirects (vacances, régimes de soins de santé, dentaires, etc) et reportés (pensions, etc.) dont bénéficient les employés.

SAE - Society of Automotive Engineers

Semaine de travail normale - Nombre moyen d'heures de travail normalement prévues dans une semaine de travail.

Services spéciaux - Catégorie d'usines qui ajoutent de la valeur à des pièces d'automobile fabriquées par d'autres, en utilisant des procédés comme la peinture, le placage, le traitement par la chaleur, etc.

Station-service - Établissement qui vend de l'essence et est exploité par les principales sociétés pétrolières.

Stock - Valeur comptable du stock possédé et détenu au Canada.

Supplier Cost Reduction Effort (SCORE) - programme des États-Unis qui presse les fournisseurs à élaborer des méthodes susceptibles de réduire les coûts. Les fournisseurs peuvent garder la moitié des économies ainsi obtenues et passent l'autre moitié aux constructeurs d'automobiles.

Objectifs de programme - consensus sur ce qu'on a déterminé comme étant le produit le plus commercialisable pour une année automobile en particulier.

Organisation de coopération et de développement économique (OCDE) - organisme qui a pour mandat de fournir aux 29 pays membres une tribune sur laquelle les gouvernements peuvent échanger leurs expériences, discuter les problèmes communs et chercher des solutions que chaque pays peut ensuite appliquer à sa propre situation. Chaque pays membre s'engage à respecter les principes de l'économie de marché et de la démocratie pluraliste.

Organisation mondiale du commerce (OMC) - créée par l'Uruguay Round et successeur du GATT, cette nouvelle organisation a commencé à exercer ses activités le 1^{er} janvier 1995.

Outil - Objet utilisé avec des machines de production ou joint à celles-ci et servant à assembler ou à travailler des matériaux par tournage, fraisage, meulage, polissage, perçage, alésage, façonnage, cisailage, pressage ou rabotage.

Outillage - Ensemble d'outils ordinaires ou spécialisés nécessaires pour produire une pièce particulière, ce qui comprend les gabarits, les montages, les jauges et les outils de coupe mais exclut les machines-outils.

Pacte de l'automobile - Année de base - En ce qui concerne le Pacte de l'automobile, période de 12 mois commençant le 1^{er} août 1963 et se terminant le 31 juillet 1964.

Pacte de l'automobile - Valeur canadienne ajoutée - La somme des coûts des pièces, du matériel, de la main-d'œuvre et du transport raisonnablement imputables à la production de véhicules ou de pièces par les fabricants produisant des véhicules au Canada.

Part de marché - pourcentage des ventes totales représentées par un fabricant ou un importateur, une marque ou une plaque commerciale.

Partnership for a New Generation of Vehicles (PNGV) - Ce partenariat, créé en 1993 entre le gouvernement des États-Unis et l'industrie américaine de l'automobile, a pour but de faire de celle-ci le chef de file technique pour ce qui du développement et de la production de véhicules abordables, économiques et peu polluantes qui correspondent aux normes de rendement actuelles.

Pièce du marché secondaire - Bien non destiné à être utilisé comme pièce d'équipement d'origine dans la production de véhicules légers ou lourds, c.-à-d. produit ou service servant à assurer l'entretien et la réparation de ces véhicules.

Planification de produit - Fonction par laquelle une entreprise est chargée de la planification, de l'ordonnancement et de la coordination des activités de production.

Plateforme - Principale structure portante d'un véhicule automobile. Elle détermine la taille de base du véhicule, soutient la transmission et lie les éléments de suspension.

Plaquette d'identification de l'importateur - Véhicules vendus par des fabricants situés principalement à l'extérieur de l'Amérique du Nord, peu importe qu'ils aient été assemblés outre-mer ou en Amérique du Nord.

Point de vente - synonyme de concessionnaire.

Prévision - Estimation de la production ou des ventes futures dans l'industrie de l'automobile.

Glossaire de termes de l'automobile

Marché du bricolage - Entretien et réparation du véhicule assurés par le propriétaire du véhicule, un ami ou un membre de sa famille, après achat des pièces de rechange dans un point de vente.

Marché d'installation par un mécanicien (MIM) - entretien et réparation d'un véhicule par un mécanicien ou un professionnel dans un centre de services.

Marché gris - Achat, par des intermédiaires, de produits qui ne leur sont pas fournis par le canal de distribution «autorisé» du fournisseur. Par conséquent, un club-entrepôt du Canada qui vend une chaîne stéréo achetée aux États-Unis ou ailleurs auprès de quelqu'un d'autre que le fabricant offre des biens sur le marché gris. Même si les produits du marché gris sont fréquemment les mêmes que ceux qui sont vendus au Canada par les canaux habituels, ce marché se charge de l'entretien ou de la réparation lorsque le fabricant refuse de le faire.

Marché secondaire (marché des pièces de rechange) - Produits et services utilisés pour assurer la réparation et l'entretien des véhicules.

Marque - nom commercial d'une voiture ou d'un camion (p. ex., Chevrolet, Ford, Dodge, Honda).

Marge ou marge brute - Bénéfice qu'un intermédiaire réalise sur le prix de vente d'un article. Par exemple, si l'intermédiaire paie 1 \$ pour un produit et le vend 1,50 \$, la marge se calcule comme suit : 50 cents divisés par 1,50 \$, soit 33 %.

Mattice - Forme solide ou creuse servant à façonner des matériaux par estampage, pressage, extrusion, étiage ou filetage.

Mercosur - la partie sud du marché commun que constituent l'Argentine, le Brésil, le Paraguay et l'Uruguay. Le Mercosur a

adopté un tarif extérieur commun le 1^{er} janvier 1995 dans le cas de près de 85 p. 100 des numéros tarifaires des quatre pays; la majeure partie du commerce entre les pays membres sera en franchise de droits.

Ministère du Commerce international et de l'Industrie (MITI) (Japon) - Ministère du gouvernement japonais établi en 1949 lors de la réorganisation de l'ancien ministère du Commerce et de l'Industrie. Le MITI joue un rôle de premier plan dans l'élaboration de politiques sur l'industrie et le commerce international par l'application de nombreuses mesures relevant de sa compétence.

Moule - Forme creuse, matrice ou cavité dans laquelle sont placés des matériaux pour fabriquer des produits de la forme désirée.

Moulage - Technique de transformation qui permet de verser du métal liquide en fusion dans un moule. Après refroidissement, le métal a pris la forme du moule.

Moulage en plastique - Processus de transformation de matériaux organiques, au moyen d'une presse polyvalente et d'un outillage particulier dans un environnement à chaleur et à pression contrôlées, et d'injection du matériel chaud dans une matrice ayant la forme finale de la pièce voulue.

Montage - Dispositif pour maintenir en place une pièce en voie de transformation par une machine-outil, non doté d'un mécanisme spécial pour guider cette dernière.

Nom du modèle - Mot, groupe de mots, lettre, nombre ou désignation similaire attribués à un véhicule automobile par une division de marketing d'un entreprise d'assemblage d'automobils.

normalisation (ISO), un organisme spécialisé dans la normalisation.

Jours d'épuisement des stocks - nombre de jours nécessaires pour vendre tous les véhicules en stock, d'après le taux de ventes du mois précédent.

L'initiative canadienne de recherche sur les matériaux légers (ICRML) - Partenariat entre le gouvernement fédéral et l'industrie visant à coordonner et à appuyer la recherche sur la mise au point et l'utilisation de matériaux légers de grande résistance dans le domaine du transport. Le but du projet est de diminuer les émissions de gaz à effet de serre et d'aider le Canada à atteindre les objectifs fixés à Kyoto et d'améliorer le rendement concurrentiel des entreprises canadiennes de première transformation des métaux, des fabricants d'automobiles, de camions et de wagons, des avionneries et de leurs fournisseurs de pièces.

Livraisons (valeur des) - Somme de la valeur des livraisons, par établissement, reçu de douane et revenus de réparation.

Loi canadienne sur la protection de l'environnement (LCPE) - loi ayant pour objet de prévenir la pollution et de protéger les Canadiens contre les substances toxiques.

Loi sur la sécurité des véhicules automobiles (LSVA) - loi qui régit la fabrication et l'importation de véhicules automobiles et de dispositifs de véhicules automobiles, afin de réduire les risques de décès, de blessures et de dommages causés aux biens et à l'environnement.

Loi sur les mesures spéciales d'importation (LMSI) - aide à protéger les producteurs canadiens de dommages causés par le dumping de produits au Canada par des exportateurs étrangers ou des

subventions accordées pour des produits par des gouvernements étrangers.

Magasin de pièces d'automobile - Revendeur et magasin de pièces d'automobile qui vendent au détail principalement des produits automobiles.

Magasin de pneus - Point de vente offrant des pneus et des services de réparation de véhicules.

Magasinage outre-frontière par des Canadiens - Achat par des consommateurs canadiens de produits vendus aux États-Unis. D'un intérêt particulier est la décision de ces acheteurs de se procurer ces produits aux États-Unis, et ce, même si des produits similaires sont offerts sur le marché canadien.

Majoration - Bénéfice qu'un intermédiaire réalise sur le coût d'acquisition d'un article. Selon l'exemple donné à la définition de «marge ou marge brute», la majoration se calcule comme suit : 50 cents divisés par 1 \$, soit 50 %.

Manganèse méthylcyclopentadiényltricarboneyle (MMT) - Le MMT est un composé organique du manganèse. Il sert d'additif pour les carburants et augmente l'indice d'octane de l'essence.

Maquila (maquiladora) - Usine d'assemblage du Mexique située près de la frontière entre les États-Unis et le Mexique, où la majeure partie de la production est exportée vers les États-Unis.

Marché de la mécanique (MM) - Entretien et réparation d'un véhicule assurés par un mécanicien/une personne de métier à un point de service.

Glossaire de termes de l'automobile

barres ou des services de traitement thermique ou de traitement des surfaces.

Franchise - Établissement qui a le droit d'exercer les pouvoirs d'une société.

G7 (Groupe des Sept) - sept pays industriels, qui comprennent les États-Unis, le Japon, l'Allemagne, la France, le Royaume-Uni, l'Italie et le Canada, et dont les dirigeants se sont réunis à des sommets économiques annuels depuis 1975 pour coordonner les politiques économiques.

Gabarit - Dispositif pour maintenir solidement en place une pièce et guider la machine-outil vers la position exacte, en vue d'usiner cette pièce avec précision.

Gains hebdomadaires moyens - Masse salariale impossible brute divisée par le nombre d'employés.

Gamme de modèles - Groupe de véhicules automobiles dotés de la même plateforme ou portant le même nom de modèle.

Marché secondaire (marché des pièces de rechange) - Produits et services utilisés pour assurer la réparation et l'entretien des véhicules.

Gaz à effet de serre (GES) - groupe de gaz qui agissent individuellement pour piéger l'énergie solaire près de la terre. Les GES pour lesquels des taux d'émission ont été établis sont l'oxyde de carbone (CO_2), le méthane (CH_4), l'oxyde nitreux (N_2O), l'hexafluorure de soufre (SF_6), le tétrafluorométhane (CF_4), l'hexafluorure de carbone (C_2F_6) et l'hydrocarbure fluoré (HFCs).

Gestion de la qualité totale (GQT) - Technique de gestion visant à améliorer la qualité des produits et services, à réduire les frais d'exploitation et à augmenter la satisfaction de la clientèle.

Grossiste - Intermédiaire qui vend à d'autres intermédiaires, comme une firme qui achète un produit d'un fabricant et le vend à un détaillant.

IV - Ingénierie de la valeur

Importateur - Organisation exerçant habituellement son activité sans lien de dépendance ou aux termes d'une entente contractuelle conclue avec un fabricant, en vue d'amener au Canada des produits faits dans un autre pays.

Importation captive - Véhicule ou pièce automobile fabriqués par un autre constructeur d'automobiles et habituellement destinés à être vendus sous le nom de la marque de l'importateur.

Ingénierie de la production - Planification et contrôle du moyen mécanique de changement de la forme et de la condition des matériaux, à des fins d'augmentation de l'efficacité et de la valeur.

Injection de carburant - Système d'alimentation en carburant sans carburateur qui pulvérise une quantité prédéterminée de carburant dans la tuyauterie d'admission (cylindre pour les moteurs diesel) d'un moteur à combustion interne.

Intermédiaire - Firme ou organisation qui exerce son activité entre le producteur des biens et l'acheteur final. Par conséquent, les membres du canal de distribution précité sont des intermédiaires.

ISO 9000 - Ensemble de normes internationales sur le management et l'assurance de la qualité visant à aider les entreprises à documenter efficacement les mesures qu'elles doivent prendre pour rendre leur système qualité plus efficace. Ces normes ont été élaborées par l'Organisation internationale de

Essai de produit - Méthodes rigoureuses de mesure de la qualité et de la durabilité d'un produit.

Estampage - Technique de transformation qui permet de fabriquer des pièces automobiles par façonnage, par pliage ou par étrépage de feuilles de métal en rouleau, selon une séquence prédéterminée et au moyen d'outils particuliers dont est dotée une presse polyvalente.

Établissement - Plus petite entité opérationnelle produisant un ensemble homogène de biens et de services et étant en mesure de rendre compte d'une gamme complète de variables de compte de production en vue de calculer la «valeur ajoutée».

Expérience de Windsor - Chrysler Canada a lancé, de concert avec l'administration fédérale et des établissements d'enseignement, un certain nombre d'initiatives regroupées sous le nom d'Expérience de Windsor. Dans le cadre de ce projet, on effectue des études visant à évaluer les pratiques exemplaires de formation et d'enseignement en Europe pour ensuite appliquer les résultats dans divers programmes d'acquisition de compétences.

Fabrication - Technique de transformation (c.-à-d. formage du métal, usinage, moulage par injection, moulage par soufflage, moulage sous pression, forgeage, processus électrique/électronique, assemblage, revêtement/placage); utilisation de la capacité (en pourcentage); volumes de production; alliances stratégiques (par ex., coentreprise, accord technologique).

Fabricants de matériel de marque (OEM) - Fabricant qui achète et incorpore des produits d'autres fournisseurs dans sa propre production. Les produits fournis à un OEM font partie d'un ensemble.

Facteurs de consommation - Caractéristiques démographiques des consommateurs, y compris l'âge, le sexe, le revenu, le lieu de résidence et l'abordabilité.

Feraille - Véhicule enregistré l'année précédente, mais non réenregistré pendant l'année en cours.

Finance et contrôle - Propriété d'une société (c.-à-d. canadienne, américaine, japonaise, allemande, etc.), publique ou privée; investissements en immobilisations : bâtiments, machines et équipement et programmes d'outillage.

Filiale - Organisation qui exerce son activité au Canada mais qui appartient ou est contrôlée par une société étrangère, laquelle peut ou non fabriquer des produits au pays.

Firme - Entreprise ou institution, que ce soit une entreprise individuelle, une société de personnes, une société ou une autre forme d'organisation. Forgeage - Procédé de transformation du métal solide en formes de diverses épaisseurs, nécessitant souvent une forme de chauffage.

Formage du métal - Transformation du métal solide ou en fusion par moulage, forgeage, estampage ou usinage.

Fournisseur de niveau 1 - Fabricant lié aux entreprises d'assemblage de véhicules chargées de livrer le produit fini, de développer les produits et d'assurer le renouvellement continu de la technologie.

Fournisseur de niveau 2 - Producteur de pièces ajoutant de la valeur à un sous-ensemble mineur.

Fournisseur de niveau 3 - Fournisseur de matériaux ouvrés et de services spéciaux, comme des rouleaux de métal en feuille, des

Glossaire de termes de l'automobile

situés dans l'océan Pacifique et aux environs : l'Australie, Brunéi, le Canada, le Chili, la Chine, Hong Kong, l'Indonésie, le Japon, la Malaisie, le Mexique, la Nouvelle-Zélande, la Papouasie-Nouvelle-Guinée, les Philippines, Singapour, la Corée du Sud, Taiwan, la Thaïlande et les États-Unis.

Corporate Average Fuel Economy (CAFE) - Loi adoptée en 1975, qui oblige les fabricants de véhicules automobiles à classer leurs ventes de parcs de véhicules américains soit dans la catégorie marché intérieur, soit dans la catégorie importation, aux fins du calcul de la moyenne d'économie de carburant.

Corridors Program (É.-U.) - Projet de recherche et développement mis en oeuvre en vertu de la loi américaine sur le transport intermodal intitulée Intermodal Surface Transportation Efficiency Act (ISTEA) de 1991 pour tenter de régler le problème de la congestion des réseaux routiers urbains.

Coût de production - Coût réellement engagé par le fabricant pour produire un véhicule (cela exclut la majoration).

Décision d'achat - Action de décider ou non d'acheter un produit ou de faire effectuer une réparation. Le cas échéant, cette action est suivie du choix du produit ou du service.

Dépenses en immobilisations- Dépenses visant à acquérir ou à améliorer des immobilisations, et ce, en vue d'obtenir des avantages au cours de plusieurs exercices. Figurent parmi ces dépenses les coûts d'acquisition, de construction ou d'installation de nouvelles usines, machines ou pièces d'équipement durables, à des fins de remplacement, d'ajout ou de location à plus ou moins long terme à d'autres entreprises, et les subventions.

Diagnostic de bord - service qui surveille l'unité de commande électronique et les réactions des systèmes pour détecter des erreurs au cours du fonctionnement normal d'un véhicule. Lorsque le véhicule est réparé, cette information sur les erreurs peut être téléchargée et affichée à l'intention du service de réparation qui facilitera ensuite le dépannage.

Distributeur - Synonyme de grossiste. Le distributeur s'acquitte de bon nombre des mêmes fonctions qu'un grossiste, comme la vente, la distribution physique, le crédit, etc. Certaines industries utilisent le terme distributeur plutôt que celui de grossiste.

Droits de douane - Droits de douane imposés en vertu du Tarif des douanes sur les marchandises importées.

Droits de propriété intellectuelle (DPI) - droit de posséder ou de contrôler l'utilisation de la propriété intellectuelle, comme les marques de commerce, les droits d'auteur, les brevets et les secrets commerciaux.

Effectif - Effectif total dans chaque installation de fabrication, ce qui comprend la totalité des employés de production et des membres du personnel de soutien, du génie et de la R-D.

Nombre moyen de travailleurs employés par un établissement durant l'année. Par employés de production, on entend le nombre moyen de travailleurs participant véritablement au processus de fabrication. Par employés de l'administration ou non liés à la production, on entend ceux qui travaillent au siège social ou dans les bureaux de vente.

Enregistrement - document de propriété de véhicule automobile déposé auprès de la province ou de l'État.

Ensemble de composants - Combinaison d'au moins deux pièces ou sous-composants pour former un ensemble.

Commerce électronique - Activité commerciale menée au moyen de dispositifs électroniques de communication (surtout des ordinateurs). C'est un moyen économique pour les entreprises de vendre des produits, de payer les factures, de contrôler leurs stocks et de communiquer avec leurs fournisseurs et leurs clients.

Composant - Matière première, ingrédient, pièce ou sous-ensemble qui entre dans la composition d'un ensemble, composé ou autre article.

Conception de pièce - activité liée à la conception de pièces précises, y compris la responsabilité à l'égard du matériel, du coût, du poids, de la fiabilité, de la durabilité, de la fonction, de l'apparence et de la facilité d'entretien.

Conception de produit - Processus de planification des caractéristique d'un produit.

Concessionnaire automobile - Point de vente qui offre une (ou dans certains cas, aux États-Unis, plusieurs) gamme de produits d'un fabricant et dont la clientèle se compose des consommateurs en général et des exploitants de parcs de véhicules. Il assurera aussi l'entretien et vendra des pièces de rechange pour la marque de véhicules qu'il offre. Dans certains cas, un concessionnaire peut vendre une autre gamme de produits d'un fabricant.

Chaîne d'approvisionnement - Procédés qui s'échelonnent depuis l'extraction des matières premières jusqu'à la consommation du produit fini par les entreprises, établissant un lien entre les fournisseurs ou les utilisateurs.

Concessionnaire - Entreprise qui achète et vend, ajoutant une certaine valeur pour le consommateur au cours du processus. Il s'agit souvent d'une entreprise qui, dans le canal de distribution, exerce son activité plus près du consommateur que ne l'est un

distributeur ou un grossiste, et qui peut ajouter plus de valeur pour les consommateurs que ces derniers.

Concessionnaire de voitures neuves - Important concessionnaire de voitures, comportant un service d'entretien et de réparation et un service de vente de pièces de rechange.

Concessionnaire en titre - Particulier ou société qui possède et contrôle un ou plusieurs concessionnaires automobiles.

Concurrence dans un même canal - Rivalité entre les membres de même niveau d'un canal de distribution. Par exemple, les grands magasins qui se font concurrence.

Concurrence entre canaux - Rivalité entre différents canaux du système de distribution. Par exemple, des détaillants indépendants qui font concurrence aux détaillants des fabricants.

Conseil du service d'entretien et de réparation automobiles du Canada (SERAC) - organisme à but non lucratif ayant pour mandat de répondre aux besoins en formation et en ressources humaines de l'industrie canadienne de réparation et de service d'automobiles et de camions.

Contrat de location - Forme de contrat transférant le droit d'utiliser un véhicule en retour d'un paiement.

Conversion - Modification de l'équipement soit pour neutraliser les effets de la production qui vient de se terminer, soit pour préparer l'équipement pour la fabrication du prochain article prévu, ou les deux.

Coopération économique Asie-Pacifique (APEC) - organisme créé en 1989 pour promouvoir le commerce et l'investissement dans le bassin du Pacifique. L'APEC regroupe actuellement dix-huit pays

Glossaire de termes de l'automobile

Autobus - Véhicule automobile pour le transport des voyageurs, ou châssis, dans lequel peuvent prendre place plus de 10 personnes.

Automobile - Véhicule automobile à quatre roues dans lequel peuvent prendre place au plus dix personnes, ce qui comprend les voitures de police et les voitures de course mais exclut les ambulances et les corbillards.

Automotive Industry Action Group (AIAG) (É.-U.) - Groupe constitué dans le but d'augmenter la productivité de ses membres grâce à une collaboration entre les fabricants d'automobiles nord-américains et leurs fournisseurs. Le groupe sert surtout de tribune où sont échangés des renseignements stratégiques non écrits.

Automobile de programme - Automobiles vendues par des fabricants à des fins d'utilisation dans un parc. S'applique habituellement à des très importants parcs automobiles, comme ceux des entreprises de location de véhicules.

Bénéfice d'exploitation - Bénéfices avant impôts après retransfert d'atelier de réparation indépendant - Petit point de service offrant des services de réparation spécialisés. Habituellement, il ne vend pas d'essence.

CRM - Changement rapide de matrice.

Camion de poids moyen - Véhicule dont le poids se situe entre 14 001 et 26 000 livres.

Camion lourd - Camion dont le poids se situe entre 26 001 et 33 001 livres. Cette catégorie comprend aussi les camions hors route.

Camion léger - Véhicule dont le poids est inférieur à 14 000 livres.

Canal de distribution - Chemin que suivent les biens au cours du transfert de leur titre du producteur au consommateur. Le transfert de titre des biens de consommation est habituellement accompagné du transfert des biens physiques.

Capacité - Production maximum atteignable dans des conditions normales. Par conditions normales, on entend que doivent être suivies les pratiques opérationnelles de l'entreprise en ce qui concerne l'utilisation des installations de production, le recours au temps supplémentaire et aux quarts de travail, le respect des vacances, etc.

Carburants de remplacement-Tout carburant autre que l'essence ordinaire, plus particulièrement les carburants qui produisent moins de polluants atmosphériques (comme le gaz naturel ou le propane liquide).

Changement climatique - phénomène suscitant une inquiétude partout dans le monde au sujet des taux d'émission de gaz à effet de serre (GES) dans l'atmosphère, qui modifient le climat de façon à nuire à notre bien-être socio-économique.

Classification type des industries (CTI) - catégorie d'industries qui représente un niveau d'organisation de la production par type de spécialisation. Actuellement, c'est la Classification type des industries de 1980 qui est en vigueur et qui identifie chaque industrie par un niveau comprenant quatre chiffres. Le Système de classification des industries de l'Amérique du Nord (SCIAN) entrera en vigueur en 1997.

Coentreprise - collaboration commerciale internationale entre des intérêts étrangers et des parties du secteur privé d'un pays hôte, où deux parties ou plus forment une nouvelle entreprise commerciale à laquelle chacune contribue et dans laquelle la propriété et le contrôle sont partagés.

ARV - Accord de restriction volontaire s'appliquant aux fabricants japonais exportant aux États-Unis (déormais plus en vigueur).

AV - Analyse de la valeur

Accord de libre-échange des Amériques (ALEA) - effort visant à unir les économies de l'hémisphère occidental pour en arriver à un accord unique de libre-échange. Les chefs d'État des 34 démocraties de la région ont convenu de construire une « Zone de libre-échange des Amériques » et de terminer les négociations entamées en vue de la conclusion de l'accord d'ici 2005.

Accord de libre-échange (ALE) entre le Canada et les États-Unis - mis en oeuvre en janvier 1989 en vue d'éliminer les droits de douane sur les produits américains et canadiens d'ici janvier 1998 et de réduire ou de supprimer de nombreuses barrières non tarifaires.

Accord de libre-échange nord-américain (ALENA) - accord portant sur la libéralisation des échanges entre les États-Unis, le Canada et le Mexique. L'ALENA est entré en vigueur le 1^{er} janvier 1994.

Accord général sur les tarifs douaniers et le commerce (GATT) - signé en 1947, le GATT était un accord multilatéral officiel visant à accroître et à libéraliser le commerce mondial. L'Organisation mondiale du commerce, qui a succédé au GATT, a vu le jour le 1^{er} janvier 1995.

Achat - Totalité des matériaux achetés pour fabriquer/assembler des pièces automobiles (c.-à-d. acier, matières plastiques, caoutchouc, textiles, etc.).

Activités Kaizen - Activité par laquelle on cherche continuellement à s'améliorer.

Agent ou courtier - Intermédiaire autorisé par la loi à exercer son activité au nom du fabricant.

Aménagement intérieur - désignation assignée par des fabricants de véhicules qui représentent des ensembles d'équipement précis.

American Automobile Labelling Act (AALA) - Loi obligeant les fabricants de véhicules à fournir de l'information au sujet des caractéristiques de ceux-ci sur les étiquettes apposées sur les voitures et camions vendus aux États-Unis après le 1^{er} octobre 1994.

Automobiles de programme - Automobiles vendues par des fabricants à des fins d'utilisation dans un parc. S'applique habituellement à de très importants parcs automobiles, comme ceux des entreprises de location de véhicules.

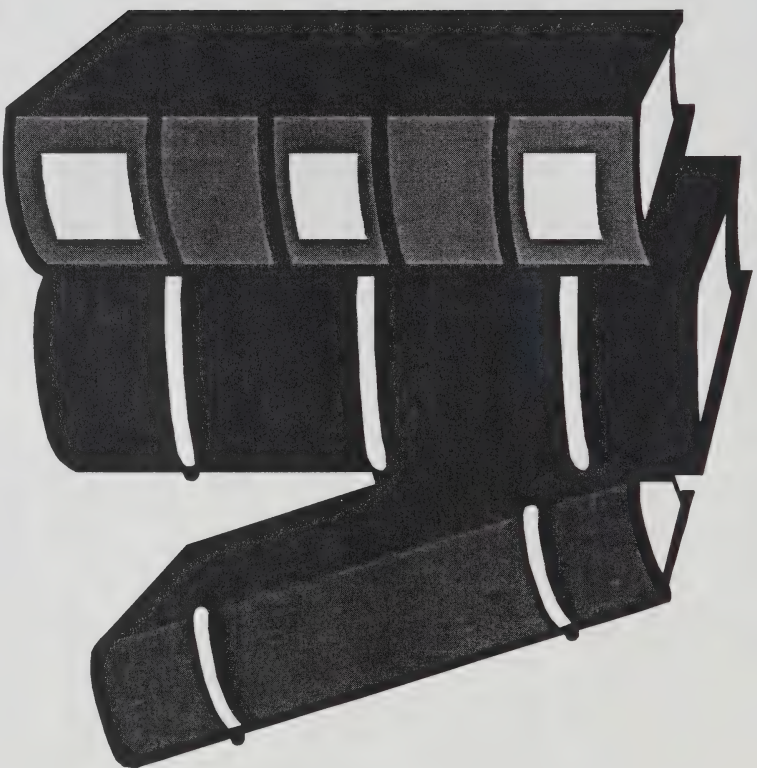
Atelier de carrosserie - Point de service spécialisé dans la réparation de la carrosserie des véhicules.

Atelier de réparation indépendant - Petit point de service offrant des services de réparation spécialisés. Habituellement, il ne vend pas d'essence.

Articles d'appel - produits dont les prix sont réduits dans l'espoir qu'ils attireront des clients dans le magasin.

Association des nations de l'Asie du Sud-Est (ANASE) - organisme composé d'États (dont Brunei, Myanmar, l'Indonésie, le Laos, la Malaisie, les Philippines, Singapour, Thaïlande et le Viet Nam), fondé en 1967 et chargé de présenter un front uni dirigeant l'évolution politique, économique et stratégique de la région.

Atelier de réparation spécialisé - Point de service qui offre des produits et services spécialisés pour les véhicules.



Glossaire

Toyota	Georgetown (Kentucky) Georgetown (Kentucky) Georgetown (Kentucky) Princeton (Indiana)	200 200 100 100	1993 1988 1998 1998	Camry Avalon Mini-fourgonnette Sienna T-50
Mexique				
BMW	Toluca (Mexique)	0.3	1995	Porsche 911, séries 3 et 5
Honda	El Salto (Mexique)	15	1995	Honda Accord
Mercedes Benz	Santiago (Mexique) Tianquisteuco (Mexico)	4 11	n.d.	Voitures des classes E et S Camions (poids moyens)
Nissan	Aguascalientes (Mexique) Cuernavaca (Mexique)	155 135	1993	Sentra, Tsuru, Tsubame wagon Lucino (200X), Tsuru (Sentra)
Volkswagen	Puebla (Mexique)	300	1992	Cabrio, Golf, Jetta

Société	Emplacement	Capacité de production (en milliers)	Date d'ouverture	Produit
Canada				
CAMI *	Ingersoll (Ont.)	200	1989	Geo Metro, Swift, Sunrunner, Geo Tracker, Sidekick
Honda	Alliston (Ont.) Alliston (Ont.)	150 180	1986 1999	Civic (3 portes), Acura 1.6 EL Mini-fourgonnette
Toyota	Cambridge (Ont.) Cambridge (Ont.)	85 115	1988 1998	Corolla Solara
États-Unis				
Auto Alliance *	Flat Rock (Michigan)	240	1987	626, Cougar
BMW	Spartanburg (Caroline du nord)	85	1995	Z3, M5 coupe
Honda	Marysville (Ohio) Liberty (Ohio)	430 210	1982 1991	Accord, Acura, TL8 Civic, Acura CL
Mercedes-Benz	Vance (Alabama)	40	1998 1999	ML320 ML430
Mitsubishi	Bloomington-Normal (Illinois)	240	1988	Eclipse, Avenger, Galant, Sebring
Nissan	Smyrna (Tennessee) Smyrna (Tennessee) Avon Lake (Ohio) (Ford)	240 200 134	1983 1992 1992	Altima, Sentra, 200 SX Frontier, Quest Villager
NUMMI *	Fremont (Californie)	270 125	1984 1991	Corolla, Prizm Tacoma
Saturn Corp.	Spring Hill, Tennessee	300	1991	Saturn
SIA (Subaru/Isuzu)	Lafayette (Indiana)	220	1989	Legacy, Rodeo, Honda Passport, Isuzu Amigo

Principales usines de montage de véhicules automobiles au Canada

Tableau 6.1

Constructeurs de camions de poids lourds		
Canadian Kenworth (division de Paccar Canada Ltd.) ***	Sainte-Thérèse (QC)	Camions (poids lourds)
Navistar International Corporation Canada	Chatham (Ont.)	Camions (poids lourds)
Constructeurs d'autobus		
Canadian Bluebird Coach Ltd.	Brantford (Ont.)	Autobus scolaires
Chrysler Canada Ltd.	Windsor (Ont.)	Minibus pour 10-15 passager
Novabus	Saint-Eustache(QC)	Autobus interurbains
Motor Coach Industries Ltd.	Winnipeg (Man.)	Autobus de tourisme
New Flyer Industries Ltd.	Winnipeg (Man.)	Autobus interurbains
Orion	Mississauga (Ont.)	Autobus interurbains
Prévost Car Inc.	Sainte-Claire (QC)	Autobus de tourisme
Thomas Built Buses of Canada Ltd.	Woodstock (Ont.)	Autobus scolaires

- * Commencé en 1999
- ** Usine à fermer en décembre 1998
- *** Fermé temporairement

Principales usines de montage de véhicules automobiles au Canada

Tableau 6.1

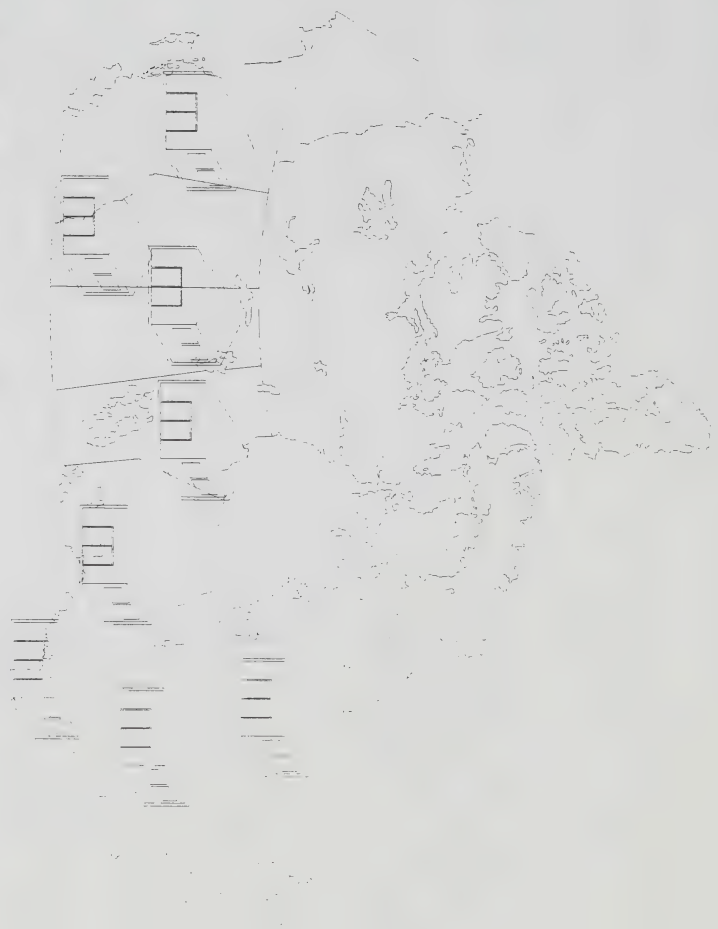
Nom de la société/de l'usine	Emplacement	Produits principaux
Constructeurs de voitures et de camion légers		
Canadian Automobile Mfg. Inc. (CAMI)	Ingersoll (Ont.)	Geo Metro, Suzuki Swift, Tracker/Sumrunner, Sidekick, nouveau programme à déterminer
Chrysler Canada Ltée	Bramalea (Ont.) Windsor (Ont.) Windsor (Ont.)	Concorde, Intrepid, LHS, 300M * Caravan, Voyager, Mini Ram Van, Ram Van, Ram Wagon
Ford du Canada Ltée	Oakville (Ont.) Oakville (Ont.) St. Thomas (Ont.)	Windstar Van Série F (camions légers) Crown Victoria, Grand
Honda Canada Inc.	Alliston (Ont.) Alliston (Ont.)	Acura EL, Civic Fourgonnette
General Motors du Canada Ltée	Oshawa (Ont.) Oshawa (Ont.) Oshawa (Ont.) Sainte-Thérèse (QC)	Lumina, Monte Carlo Century, Lumina, Regal CK-Pickup, GMC Sierra, Silverado Camaro/Firebird
Toyota Canada Inc.	Cambridge (Ont.) Cambridge (Ont.)	Corolla Solara
Volvo Canada Inc. **	Halifax (N.-É.)	Séries 70

* Commencant en 1999

** Usine à fermer en décembre 1998

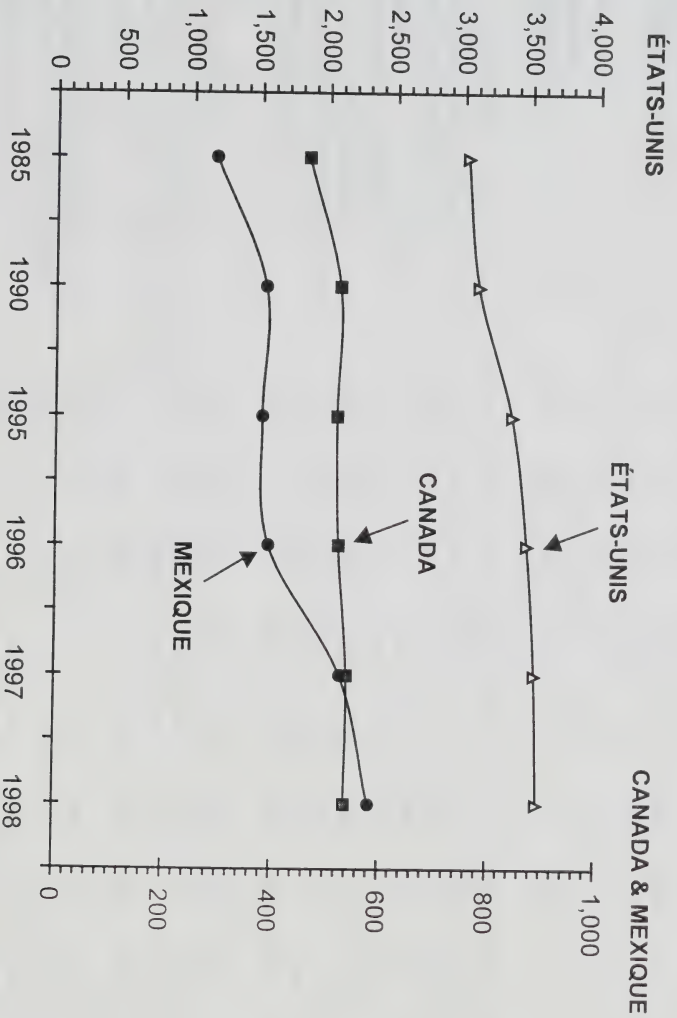
*** Ferme temporairement

Usines de véhicules automobiles au Canada



Repartition de l'emploi Nord-américaine dans le secteur d'automobile (moyenne annuelle)

Graphique 5.1



	1965	1970	1975	1980	1985	1990	1995	1996	1997	1998*
Canada										
Total de fabrication	80	87	106	112	152	154	167	167	159	172
Assemblage de véhicules (CTI 323)	43	38	45	45	57	56	54	50	51	54
Carrosseries de camions et de remorques (CTI 324)	5	10	18	15	11	12	12	15	16	18
Pièces et accessoires d'automobile (CTI 325)**	32	39	43	52	84	86	101	102	92	100
Total de ventes au détail	NA	NA	NA	NA	310	368	351	355	380	365
Concessionnaires d'automobiles/distributeurs (CTI 631)	NA	NA	NA	NA	96	129	128	130	158	143
Marché après-vente (CTI 552, 633, 634, 635)***	NA	NA	NA	NA	214	239	223	225	222	222
Total des industries automobiles	80	87	106	112	462	522	518	522	539	537
États-Unis										
Total de fabrication	816	773	856	853	946	869	991	1 026	1 046	1 046
Assemblage de véhicules (CTI 3711)	419	382	375	368	409	329	355	342	350	342
Carrosseries de camions et de remorques (CTI 3713)	34	40	46	40	37	39	41	39	41	43
Pièces et accessoires d'automobile (CTI 3714)	363	351	353	350	394	400	483	528	541	547
Pièces d'automobile embouties (CTI 3465)	NA	NA	82	95	106	101	112	117	114	114
Total de ventes au détail	522	613	1 735	1 740	2 080	2 244	2 376	2 457	2 500	2 527
Concessionnaires d'automobiles (CTI 551)	NA	NA	731	745	856	924	1 002	1 032	1 051	1 048
Marché après-vente (SIC 501, 554, 7538)****	522	613	1 004	995	1 224	1 320	1 374	1 425	1 449	1 479
Total des industries automobiles	1 338	1 386	2 591	2 593	3 026	3 113	3 367	3 483	3 546	3 573
Mexique										
Assembleurs de véhicules	NA	NA	NA	NA	54	53	53	57	61	0
Assembleurs de composants	NA	NA	NA	NA	129	174	145	151	163	0
Concessionnaires d'automobiles	NA	NA	NA	NA	65	69	52	57	68	0
Maquilleurs	NA	NA	NA	NA	43	69	139	157	169	0
Total des industries automobiles	0	0	0	0	291	365	389	422	461	0
Total de repartition Nord-américaine	1 418	1 473	2 697	2 705	3 779	4 000	4 274	4 427	4 546	4 110

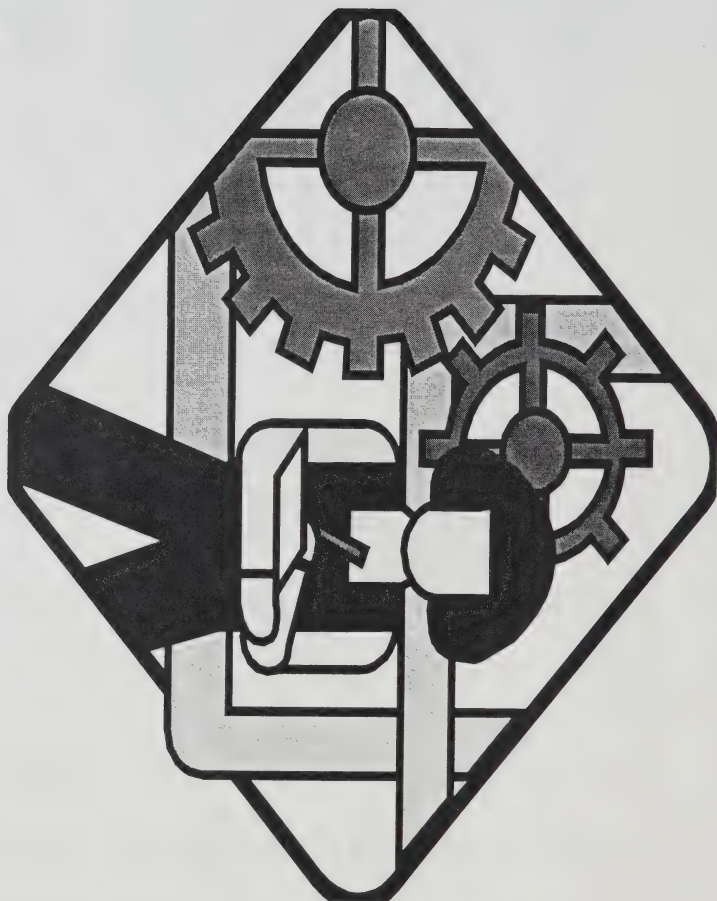
* Données pour fabrications sont de l'Enquête sur l'emploi, la rémunération et les heures (EERH). Années précédentes sont du Recensement de manufacturiers

** Y compris les fabrications pour le marché après-vente

*** Y compris les grossistes, détaillants, stations-service et ateliers de réparations

**** Y compris CTI 501 et 554 pour 1972-1981 et CTI 554 seulement pour 1965-1971

World



**Total de la valeur ajoutée au Canada, selon les catégories de production
pour les quatre principaux constructeurs canadiens* participant au Pacte de l'automobile
(en millions de dollars)**

Tableau 4.8

	1965	1970	1975	1980	1985	1990	1993	1994	1995	1996
VAC** production de véhicules (pièces non-comprise) (A)	380	483	876	1 322	2 182	3 132	3 768	3 530	3 587	4 102
VAC des pièces en production de véhicules (B)	576	510	733	1 087	3 094	3 401	3 743	3 275	3 513	4 040
VAC, pièces d'origine exportées (C)	100	651	1 106	1 755	5 095	4 551	3 637	4 068	4 155	5 197
VAC totale produite (D = A + B + C)	1 056	1 644	2 715	4 164	10 371	11 084	11 148	10 873	11 255	13 339
VAC pièces en % de la VAC totale ((B + C)/D)	64.0	70.6	67.7	68.3	79.0	71.7	66.2	67.5	68.1	69.2
VAC production de véhicules % de la VAC totale ((A + B)/D)	90.5	60.4	59.3	57.9	50.9	58.9	67.4	62.6	63.1	61.0

- * General Motors, Ford, Chrysler (incluant AMC avant 1987) et CAMI (commençant en 1989).
- ** Valeur ajoutée au Canada.

Source: Données de 1965 à 1977 compilées par la Commission Reisman; données de 1978 à 1996 préparées par Industrie Canada.

Pourcentage de la valeur ajoutée au Canada - coûts des marchandises de tous les constructeurs * participant au Pacte de l'automobile (en millions de dollars)

Tableau 4.7

	Année du modèle										
	1965	1970	1975	1980	1985	1989	1990	1993	1994	1995	1996
Coût des ventes de véhicules au Canada des constructeurs participant au Pacte de l'automobile (toutes les entreprises)	1 534	1 891	4 545	8 757	13 022	15 402	13 244	12 907	17 425	17 535	17 750
Total de la valeur ajoutée au Canada (toutes les entreprises)	956	1 643	2 987	4 659	10 210	11 438	11 238	10 964	11 732	12 638	12 340
Différence entre le coût des ventes et la valeur ajoutée au Canada	578	248	1 558	4 098	2 812	3 964	2 006	1 943	5 693	4 897	5 410
Valeur ajoutée au Canada											
<i>Valeur ajoutée au Canada totale en pourcentage du coût des marchandises vendues</i>	63	91	66	53	78	74	85	85	67	72	70

* Basé sur 18 sociétés majeures.

Source: *Compilé à partir de rapports des sociétés participant au Pacte de l'automobile; ces rapports ont été présentés à Industrie Canada.*

par les sociétés * * participant au Pacte de l'automobile au Canada
(pour cent)

		Année du modèle										
		1965	1970	1975	1980	1985	1989	1990	1993	1994	1995	1996
Voitures de tourisme												
(ratio requis : entre 95 et 100)												
Ratio de la valeur des ventes nettes atteint												
(toutes les entreprises)												
		100	161	122	106	174	138	158	197	201	244	249
Camions et véhicules commerciaux												
(ratio requis : entre 75 et 100)												
Ratio de la valeur des ventes nettes atteint												
(toutes les entreprises)												
		94	129	101	115	192	188	197	285	199	210	205
Autobus												
(ratio requis : entre 85 et 100)												
Ratio de la valeur des ventes nettes atteint												
(toutes les entreprises)												
		99	154	114	199	324	230	342	242	359	277	266

- * Le ratio valeur de production nette/valeur des ventes nettes est le rapport de la valeur totale de la production des véhicules canadiens et de la valeur des ventes nettes totales de véhicules pour toutes les entreprises participant au Pacte de l'automobile.

** Basé sur 18 sociétés majeures.

Source : *Compilé à partir des rapports des sociétés participant au Pacte de l'automobile; ces rapports ont été présentés à Industrie Canada.*

Commerce canadien des produits de l'automobile (autres pays) * (en millions de dollars)

Tableau 4.5

	1965	1970	1975	1980	1985	1990	1995	1996	1997
Exportations canadiennes									
Automobiles	82	66	163	407	39	147	977	588	405
Camions et autres véhicules**	10	75	258	227	187	95	235	192	344
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	32	17	28
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	64	20	2
Pièces	32	99	180	420	307	491	1 754	1 350	1 539
Pneus et chambres à air	4	3	5	31	45	13	25	26	27
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	0
Total	128	243	606	1 085	578	746	3 087	2 193	2 345
Importations canadiennes									
Automobiles	113	217	365	1 029	2 727	3 786	3 618	3 646	1 263
Camions et autres véhicules**	2	23	45	130	380	318	428	629	146
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	1	5	8
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	12	4	5
Pièces	21	130	206	355	1 459	2 923	3 757	4 260	1 310
Pneus et chambres à air	2	19	82	208	207	233	310	271	163
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	4	2	1
Total	138	389	698	1 722	4 773	7 260	8 130	8 817	2 896
Solides									
Automobiles	(31)	(151)	(202)	(622)	(2 688)	(3 639)	(2 641)	(3 058)	(858)
Camions et autres véhicules**	8	52	213	97	(193)	(223)	(193)	(437)	198
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	31	12	20
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	52	16	(3)
Pièces	11	(31)	(26)	65	(1 152)	(2 432)	(2 003)	(2 910)	229
Pneus et chambres à air	2	(16)	(77)	(177)	(162)	(220)	(285)	(245)	(136)
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	(4)	(2)	(1)
Total	(10)	(146)	(92)	(637)	(4 195)	(6 514)	(5 043)	(6 624)	(551)

* N'inclus pas l'États-Unis, le Japon et le Mexique.

** Les camions comprennent les mini-fourgonnettes, camions légers lourds.

Autres véhicules comprennent les autobus, véhicules spéciaux et habitations roulottes.

Les données après 1989 ont été compilées par Industrie Canada à partir des définitions et données de Statistique Canada.

Source: *Statistique Canada, n° au catalogue 65-001P et 11-001E (1965-1989).*

	1989	1990	1991	1992	1993	1994	1995	1996	1997
Exportations canadiennes									
Automobiles	7	11	6	1	33	57	130	113	70
Camions et autres véhicules *	3	2	4	1	10	16	11	18	8
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	56	359	0	356
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	8	10	8	7
Pièces	27	41	49	43	56	63	34	41	57
Pneus et chambres à air	1	0	4	5	10	7	8	0	1
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	0	0
Total	38	54	63	50	109	207	552	180	499
Importations canadiennes									
Automobiles	2 632	2 700	2 993	3 131	2 212	1 585	1 341	1 210	2 471
Camions et autres véhicules *	367	323	332	384	335	226	46	186	185
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	58	0	0	8
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	225	285	195	66
Pièces	905	1 195	1 239	1 353	1 622	1 277	1 305	1 364	1 154
Pneus et chambres à air	118	113	101	97	105	109	109	93	101
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	54	15	3	10
Total	4 022	4 331	4 665	4 965	4 274	3 480	3 086	3 048	3 985
Solides									
Automobiles	(2 621)	(2 689)	(2 987)	(3 130)	(2 179)	(1 528)	(1 211)	(1 097)	(2 401)
Camions et autres véhicules *	(365)	(321)	(328)	(383)	(325)	(210)	(35)	(168)	(177)
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	56	359	(8)	356
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	(217)	(275)	(187)	(59)
Pièces	(864)	(1 154)	(1 190)	(1 310)	(1 566)	(1 214)	(1 271)	(1 323)	(1 097)
Pneus et chambres à air	(118)	(113)	(97)	(92)	(95)	(102)	(101)	(93)	(100)
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	(54)	(15)	(3)	(10)
Total	(3 984)	(4 277)	(4 602)	(4 915)	(4 165)	(3 273)	(2 534)	(2 868)	(3 486)

* Les camions comprennent les mini-fourgonnettes, camions légers et lourds.

Autres véhicules comprennent les autobus, véhicules spéciaux et habitations roulottes.

Les données après 1989 ont été compilées par Industrie Canada à partir des définitions et données de Statistique Canada.

Source: *Statistique Canada, n° au catalogue 65-001P et 11-001E (1965-1989).*

Commerce Canada-Mexique des produits de l'automobile (en millions de dollars)

Tableau 4.3

	1989	1990	1991	1992	1993	1994	1995	1996	1997
Exportations canadiennes									
Automobiles	0	1	1	0	5	61	43	63	37
Camions et autres véhicules*	0	0	1	1	0	0	0	1	0
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	454	806
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	0	0
Pièces	76	69	83	155	139	63	187	176	279
Pneus et chambres à air	2	1	1	1	1	7	0	0	12
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	0	0
Total	78	71	86	157	145	131	230	694	1 134
Importations canadiennes									
Automobiles	73	117	673	534	881	1 059	1 416	1 464	1 459
Camions et autres véhicules*	1	17	43	68	81	101	153	204	276
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	0	0
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	316	462
Pièces	678	789	1 030	1 125	1 442	1 672	1 545	1 597	1 946
Pneus et chambres à air	0	0	0	0	0	2	4	2	3
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	1 526	888	357	462
Total	752	923	1 746	1 727	2 404	4 360	4 006	3 940	4 608
Solides									
Automobiles	(72)	(116)	(673)	(534)	(876)	(998)	(1 373)	(1 401)	(1 422)
Camions et autres véhicules*	(1)	(17)	(42)	(67)	(81)	(101)	(153)	(203)	(276)
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	138	344
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	0	0	(316)	(462)
Pièces	(609)	(720)	(947)	(970)	(1 303)	(1 609)	(1 358)	(1 421)	(1 667)
Pneus et chambres à air	1	1	1	1	1	5	(4)	(2)	9
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	(1 526)	(888)	(357)	(462)
Total	(681)	(852)	(1 660)	(1 570)	(2 259)	(2 703)	(2 888)	(3 205)	(3 474)

Les camions comprennent les mini-fourgonnettes, camions légers et lourds.

* Autres véhicules comprennent les autobus, véhicules spéciaux et habitations roulottes.

Les données après 1989 ont été compilées par Industrie Canada à partir des définitions et données de Statistique Canada.
Source: Statistique Canada, n° au catalogue 65-001P et 11-001E (1965-1989).

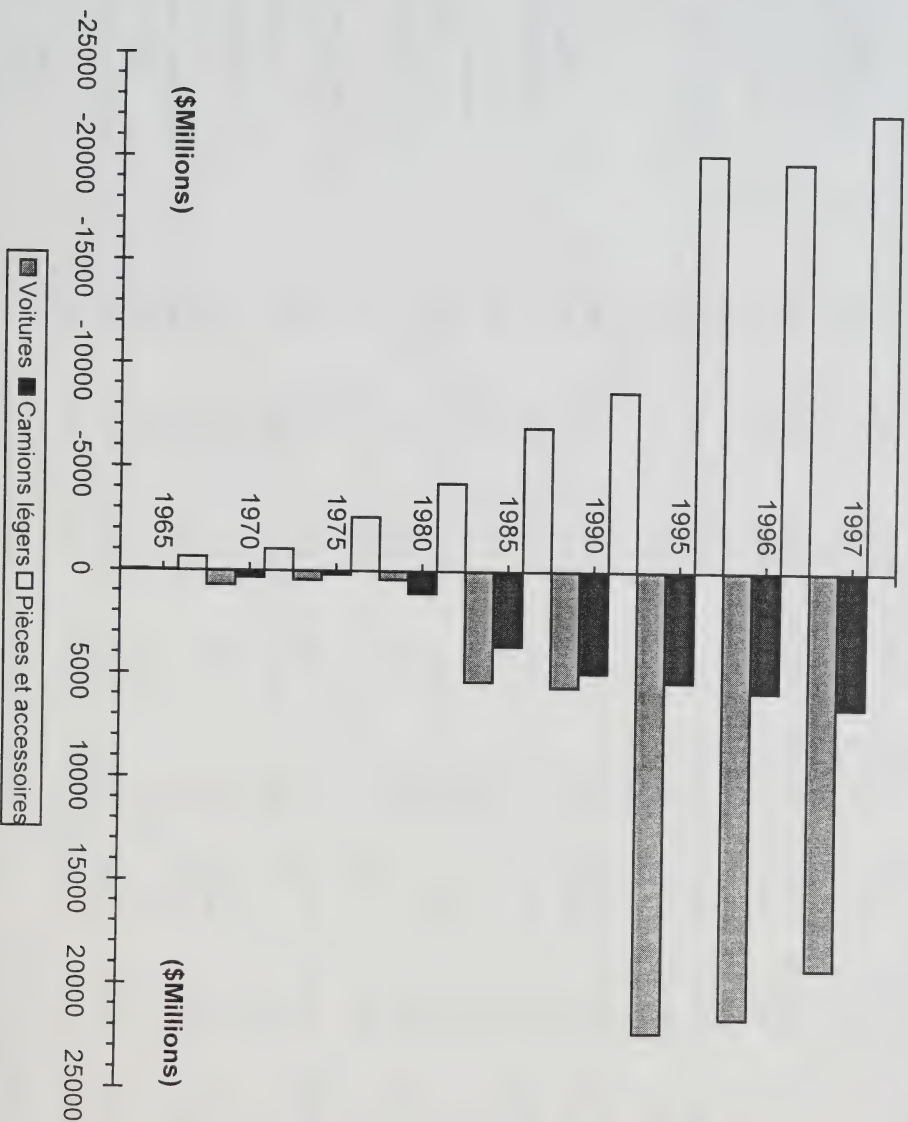
	1965	1970	1975	1980	1985	1990	1995	1996	1997
Exportations canadiennes									
Automobiles	74	1 538	2 858	4 452	15 277	16 171	34 605	34 994	36 500
Camions et autres véhicules*	21	589	932	2 218	6 422	7 982	11 587	11 816	13 797
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	109	346	133
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	560	555	691
Pièces	151	1 127	2 045	3 405	11 512	9 989	13 055	14 290	15 824
Pneus et chambres à air	4	15	68	231	592	708	1 214	1 327	1 519
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	397	268	397
Total	250	3 269	5 903	10 306	33 803	34 850	61 527	63 596	68 861
Importations canadiennes									
Automobiles	94	659	2 183	3 388	8 566	6 885	9 633	10 279	12 527
Camions et autres véhicules*	60	275	942	1 217	2 570	2 736	6 006	5 525	6 923
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	52	68	66
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	64	142	156
Pièces	797	2 107	4 425	7 600	17 438	16 252	31 277	31 538	35 464
Pneus et chambres à air	10	24	174	146	264	442	839	811	967
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	195	124	144
Total	961	3 065	7 724	12 351	28 838	26 315	48 066	48 487	56 247
Solides									
Automobiles	(20)	879	675	1 064	6 711	9 286	24 972	24 715	23 973
Camions et autres véhicules*	(39)	314	(10)	1 001	3 852	5 246	5 581	6 291	6 874
Camions hors route	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	161	414	199
Remorques/auto caravanes	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	624	697	847
Pièces	(646)	(980)	(2 380)	(4 195)	(5 926)	(6 263)	(18 222)	(17 248)	(19 640)
Pneus et chambres à air	(6)	(9)	(106)	85	328	266	375	516	552
Pièces de caoutchouc	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	592	392	541
Total	(711)	204	(1 821)	(2 045)	4 965	8 535	13 461	15 109	12 614

* Les camions comprennent les mini-fourgonnettes, camions légers et lourds.

Autres véhicules comprennent les autobus, véhicules spéciaux et habitations roulottes.

Les données après 1989 ont été complées par l'Industrie Canada à partir des définitions et données de Statistique Canada.

Source: *Statistique Canada, n° au catalogue 65-001P et 11-001E (1965-1989).*



	1965	1970	1975	1980	1985	1990	1995	1996	1997
Exportations canadiennes									
Automobiles	156	1 604	3 021	4 859	16 672	16 318	35 582	35 582	37 012
Camions et autres véhicules*	31	664	1 190	2 445	6 609	8 077	11 822	12 008	14 149
Camions hors route	N/A	N/A	N/A	N/A	N/A	93	151	193	223
Remorques/auto caravanes	N/A	N/A	N/A	N/A	N/A	324	618	568	706
Pièces	183	1 226	2 225	3 825	11 819	10 480	14 809	15 640	17 420
Pneus et chambres à air	8	18	73	262	637	721	1 239	1 353	1 559
Pièces de caoutchouc	N/A	N/A	N/A	N/A	N/A	112	221	157	227
Total	378	3 512	6 509	11 391	35 737	36 125	64 442	65 501	71 296
Importations canadiennes									
Automobiles	207	876	2 548	4 417	11 293	10 671	13 251	13 925	17 720
Camions et autres véhicules*	62	298	987	1 347	2 950	3 114	6 434	6 154	7 530
Camions hors route	N/A	N/A	N/A	N/A	N/A	100	91	94	103
Remorques/auto caravanes	N/A	N/A	N/A	N/A	N/A	57	139	153	167
Pièces	818	2 237	4 631	7 955	18 897	19 175	35 231	35 768	39 874
Pneus et chambres à air	12	43	256	354	471	675	1 149	1 082	1 234
Pièces de caoutchouc	N/A	N/A	N/A	N/A	N/A	60	195	124	144
Total	1 099	3 454	8 422	14 073	33 611	33 852	56 490	57 300	66 772
Solides									
Automobiles	(51)	728	473	442	5 379	5 647	22 331	21 657	19 292
Camions et autres véhicules*	(31)	366	203	1 098	3 659	4 963	5 388	5 854	6 619
Camions hors route	N/A	N/A	N/A	N/A	N/A	193	242	287	326
Remorques/auto caravanes	N/A	N/A	N/A	N/A	N/A	381	757	721	873
Pièces	(635)	(1 011)	(2 406)	(4 130)	(7 078)	(8 695)	(20 422)	(20 128)	(22 454)
Pneus et chambres à air	(4)	(25)	(183)	(92)	166	46	90	271	325
Pièces de caoutchouc	N/A	N/A	N/A	N/A	N/A	172	416	281	371
Total	(721)	58	(1 913)	(2 682)	2 126	2 273	7 952	8 201	4 524

* Les camions comprennent les mini-fourgonnettes, camions légers et lourds.

Autres véhicules comprennent les autobus, véhicules spéciaux et habitations roulottes.

Les données après 1989 ont été complétées par Industrie Canada à partir des définitions et données de Statistique Canada.

Source: *Statistique Canada, n° au catalogue 65-001P et 11-001E (1965-1989).*



Données sur le commerce et le Pacte de l'automobile

Produit intérieur brut (coûts des facteurs aux prix de 1992)
(en millions de dollars)

Tableau 3.5

	1992	1993	1994	1995	1996	1997	1998
Ensemble des industries	604 275	619 194	643 063	655 088	665 277	698 259	717 548
Industries manufacturières	96 181	101 877	108 403	113 740	114 942	123 155	128 018
Industrie des véhicules automobiles	4 232	5 381	5 786	6 052	5 934	6 516	6 743
Industries des carrosseries de camions, d'autobus et de remorques	407	472	573	665	675	756	858
Industrie des moteurs et pièces de moteurs	320	535	601	587	682	869	955
Assemblage de câble électriques	157	329	426	437	462	429	410
Industries des pièces embouties	763	906	1 024	1 120	1 149	1 532	1 635
Systèmes de direction et suspension	313	420	534	582	575	654	749
Industrie des roues et des freins	387	434	487	509	474	443	481
Pièces et accessoires en matière plastique	412	616	744	836	845	1 016	1 007
Accessoires en matière textile	485	539	358	715	746	746	748
Autres pièces et accessoires	2 002	2 152	2 324	2 626	2 631	2 911	2 908
Industries des pièces et accessoires pour véhicules automobiles	4 839	5 931	6 498	7 412	7 564	8 198	8 893
Industrie de l'automobile total	9 478	11 784	12 857	14 129	14 173	15 470	16 494
Pourcentage des industries manufacturières	9.85	11.57	11.86	12.42	12.33	12.56	12.88
Pourcentage du total	1.57	1.90	2.00	2.16	2.13	2.22	2.30

Source: Statistique Canada, n° au catalogue 15-001-XPB

**Prix moyens de voitures de tourisme
(\$ canadien)**

Tableau 3.4

	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Amérique du Nord	12 949	14 312	15 290	16 339	16 876	15 766	16 785	17 459	18 478	20 009	21 066	21 937	21 066
Du Japon	13 831	14 665	15 522	16 228	16 755	15 940	17 128	18 139	18 110	20 875	23 345	22 921	23 345
Autres pays	15 292	17 759	21 013	22 114	22 374	20 519	20 513	22 389	27 136	29 036	33 025	35 259	33 025
Total de tous le pays	14 024	15 579	17 275	18 227	18 668	17 408	18 142	19 329	21 241	23 307	25 812	26 706	25 812

	1965	1970	1975	1980	1985	1990	1995	1996	1997	1998
Dollar américain	1.078	1.077	1.017	1.169	1.366	1.167	1.377	1.390	1.387	1.484
Livre britannique	3.014	2.502	2.259	2.720	1.771	2.082	2.302	2.280	2.222	2.459
Franc français	0.220	0.189	0.238	0.277	0.153	0.215	0.228	0.224	0.231	0.252
Mark allemand	0.270	0.286	0.414	0.644	0.468	0.724	0.768	0.757	0.777	0.845
Yen japonais (000)	3.000	2.920	3.430	5.190	5.770	8.100	11.950	11.800	11.480	11.400

Source: Statistique Canada, L'observateur économique canadien, n° au catalogue 11-210-XPB et 11-010-XPB.

Dépenses en R-D de l'industrie canadienne de l'automobile (CTI 323, 324 et 325)

Tableau 3.2

	1965	1970	1981	1985	1990	1991	1992	1993	1994	1995	1996	1997*
Nombre de sociétés effectuant de la R-D	20	28	33	39	46	39	50	53	153	143	131	98
Nombre d'employés affectés à la R-D (années-personnes)	n.d.	n.d.	890	1 050	895	860	865	975	1 534	1 478	1 463	1 338
Dépenses totales en R-D (en millions de dollars)	3	12	50	78	69	77	83	125	212	185	170	175
Dépenses en R-D en % des expéditions	0.08	0.21	0.28	0.19	0.16	0.19	0.18	0.22	0.29	0.21	0.19	0.20

* Données préliminaires

Données de 1991 ont été révisé suite à la reclassification d'un participant majeure.

Commencant en 1996, les données peuvent être incomplet parce que la méthodologie utilisé par Statistique Canada a changé.

	1965	1970	1975	1980	1985	1990	1994	1995	1996	1997	1998	1999*
Constructeurs de véhicules (CTI 323)	66	32	61	136	714	787	1 342	1 608	2 915	3 184	2 486	2 286
Constructeurs de carrosseries de camions (CTI 324) **	25	13	19	47	9	8	66	86	79	87	52	66
Pièces et accessoires d'automobiles (CTI 325)	107	170	81	781	332	457	1 774	1 656	818	1 184	1 234	755
Concessionnaires d'automobiles (CTI 631) ***	NA	NA	NA	192	292	316	1 017	1 261	1 005	924	1 012	1 038
Total	198	215	161	1 156	1 347	1 568	4 199	4 611	4 817	5 379	4 732	4 079

* Intentions

** L'augmentation de 1998 à 1994 est attribuée au changement dans l'enquête.

*** Les données commençant en 1991 incluent aussi les concessionnaires de véhicules de récréation, stations de services, ateliers de réparation, et concessionnaires de pièces et accessoires. Données révisées pour les années précédentes ne sont pas encore disponibles

Nota: Diminution en 1996 est attribuée à l'investissement qui était planifiée mais a eu lieu en 1997.

Source: Statistique Canada, n° catalogue 61-205-XPB.



**Investissements/Recherche-
développement/Taux de change/Prix**

Valeur ajoutée du recensement* dans le secteur de l'automobile
(en millions de dollars)

Tableau 2.13

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996
Industries de véhicules automobiles	4 713	4 474	4 751	6 270	6 630	6 161	6 101	4 957	6 013	7 960	8 719	9 785
Carrosseries de camions et d'autobus	173	186	241	267	295	182	166	217	230	251	303	369
Remorques d'usage commercial	137	162	195	214	238	188	119	106	136	202	265	271
Remorques d'usage non-commercial	89	111	126	137	143	118	77	84	101	122	130	143
Industries des maisons mobiles	36	30	32	40	77	73	55	71	83	89	83	105
Total	435	489	594	658	752	560	417	478	550	664	781	888
Moteurs et pièces de véhicules	1 662	1 399	1 566	1 565	1 696	1 168	609	527	964	1 010	1 389	1 988
Assemblages de câbles pour véhicule	141	209	193	194	234	212	185	190	395	542	485	547
Pièces embouties pour véhicule	949	1 023	979	991	853	842	833	895	1 211	1 407	1 587	1 590
Direction, suspension pour véhicule	353	356	405	411	428	390	328	393	524	637	730	832
Roues et freins pour véhicule	543	494	507	512	513	459	412	474	551	679	713	694
Pièces en plastique pour véhicule	438	576	606	603	605	526	476	506	695	799	831	947
Accessoires, textile pour véhicule	387	410	404	409	464	480	505	592	628	729	778	810
Autres pièces et accessoires	1 709	1 624	1 696	1 725	1 837	1 916	2 166	2 286	2 391	2 529	2 837	3 009
Total	6 182	6 091	6 356	6 409	6 630	5 994	5 514	5 863	7 359	8 332	9 350	10 417
Total de l'industrie	11 330	11 054	11 701	13 337	14 013	12 715	12 032	11 298	13 922	16 956	18 850	21 090

* Différence entre la valeur des biens et services industriels produits et les coûts de matières associés avec la production des biens et services.

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996
Industries de véhicules automobiles	19 026	19 600	34 309	40 279	39 326	36 847	21 801	24 601	31 512	36 609	40 680	37 972
Carrosseries de camions et d'autobus	199	248	290	367	401	287	279	210	219	264	295	271
Remorques d'usage commercial	264	308	430	442	368	310	166	1 459	185	274	446	424
Remorques d'usage non-commercial	176	220	266	329	300	240	125	156	177	223	288	258
Industries des maisons mobiles	77	58	59	79	99	112	98	102	116	139	135	150
Total	716	834	1 045	1 217	1 168	949	668	1 927	697	900	1 164	1 103
Moteurs et pièces de véhicules	2 170	1 645	2 028	2 143	2 357	1 720	881	1 129	1 495	1 898	1 706	2 238
Assemblages de câbles pour véhicule	148	187	185	172	253	239	200	230	439	591	701	597
Pièces embouties pour véhicule	680	1 060	1 133	1 321	1 421	1 305	1 298	1 430	1 572	1 854	2 131	2 119
Direction et suspension pour véhicule	295	288	307	429	480	155	345	428	564	784	849	832
Roues et freins pour véhicule	442	419	472	540	597	535	416	476	532	634	715	721
Pièces en plastique pour véhicule	551	551	669	720	838	598	527	571	693	895	1 009	1 001
Accessoires, textile pour véhicule	488	488	524	609	648	740	699	862	995	1 274	1 324	1 379
Autres pièces et accessoires	1 589	1 589	1 669	2 086	2 381	2 430	2 635	2 869	3 082	3 608	4 296	4 376
Total	6 363	6 227	6 987	8 020	8 975	7 722	7 001	7 995	9 372	11 538	12 731	13 263
Total de l'industrie	26 105	26 661	42 341	49 516	49 469	45 518	29 470	34 523	41 581	49 047	54 575	52 338

* Représente le coût des éléments utilisés dans la fabrication.

Source: Statistique Canada, n° au catalogue 42-251B et 31-203-XPB.

Production nord-américaine de véhicules légers par compagnie (unités)

Tableau 2.11

	1991	1992	1993	1994	1995	1996	1997	1998	1998
									Part du marché
Auto Alliance (Ford/Mazda)	165 314	168 859	219 096	247 004	149 562	129 441	100 394	167 268	1.08
BMW	0	0	0	385	12 122	50 765	63 913	56 747	0.36
CAMI (GM/Suzuki)	135 184	125 435	154 650	170 231	183 510	124 100	99 770	45 063	0.29
DaimlerChrysler	1 759 474	1 983 052	2 299 824	2 645 289	2 467 812	2 759 900	2 685 255	2 909 495	18.71
Diamond Star/Mitsubishi	153 936	139 783	136 022	169 829	218 161	192 961	189 086	157 139	1.01
Ford	3 039 175	3 540 115	3 983 179	4 391 477	4 130 049	4 224 867	4 333 876	4 262 409	27.41
GM	4 463 044	4 606 026	4 980 167	5 288 493	5 328 864	5 012 895	5 427 603	4 930 844	31.71
Honda	550 347	562 374	504 396	607 018	659 263	780 050	816 494	881 694	5.67
Hyundai	28 201	15 186	14 585	0	0	0	0	0	0.00
Mercedes Benz	0	0	400	590	898	1 809	21 160	69 449	0.45
Nissan	407 847	472 888	572 755	638 199	572 580	549 668	571 071	498 624	3.21
NUMMI (GM/Toyota)	209 169	256 231	321 428	363 040	352 675	365 469	357 809	361 859	2.33
Porsche	0	0	0	0	0	29	20	13	0.00
Subaru-suzu	116 297	124 020	126 558	153 883	180 174	194 871	186 891	216 198	1.39
Toyota	255 560	308 474	313 279	361 549	471 581	483 001	540 763	647 942	4.17
VW	208 901	188 488	238 992	256 317	191 438	231 107	257 397	338 959	2.18
Volvo	7 661	6 304	5 504	6 436	7 588	7 127	6 548	8 373	0.05
Production total	11 500 110	12 497 235	13 870 835	15 299 740	14 926 277	15 108 060	15 658 050	15 552 076	100.00

Production de véhicules légers au Mexique par compagnie (unités)

Tableau 2.10

	1991	1992	1993	1994	1995	1996	1997	1998	Part du marché 1998
BMW	0	0	0	0	245	487	970	1 945	0.14
DaimlerChrysler	193 941	235 160	228 898	256 632	211 132	360 333	352 441	361 802	25.79
Ford	217 501	255 083	215 631	240 888	226 651	213 078	244 704	186 002	13.26
GM	183 933	200 360	192 279	161 094	198 407	265 804	299 485	316 516	22.56
Honda	0	0	0	0	135	1 194	3 045	7 194	0.51
Mercedes Benz	0	0	400	590	814	1 043	955	722	0.05
Nissan	142 824	172 562	185 782	193 591	106 794	135 637	172 763	189 787	13.53
Porsche	0	0	0	0	0	29	20	13	0.00
Volkswagen	208 901	186 488	238 992	256 317	191 438	231 078	257 366	338 959	24.16
Production total	947 100	1 051 653	1 061 982	1 109 112	935 616	1 208 683	1 331 749	1 402 940	100.00

Source: Ward's AutoInfoBank

Production de véhicules légers aux États-Unis par compagnie (unités)

Tableau 2.9

	1991	1992	1993	1994	1995	1996	1997	1998	1998
									Part du marché
Auto Alliance (Ford/Mazda)	165 314	168 859	219 096	247 004	149 562	129 441	100 394	167 268	1,44
BMW	0	0	0	385	11 877	50 278	62 943	54 802	0,47
DaimlerChrysler	1 073 850	1 283 369	1 427 555	1 693 535	1 718 583	1 694 121	1 705 657	1 809 342	15,56
Diamond Star/Mitsubishi	153 936	139 783	136 022	169 829	218 161	192 961	189 086	157 139	1,35
Ford	2 395 644	2 784 448	3 294 217	3 655 762	3 371 424	3 474 707	3 458 343	3 449 023	29,66
GM	3 581 595	3 735 726	4 040 453	4 403 909	4 222 624	3 994 720	4 233 144	3 863 421	33,23
Honda	451 197	458 251	403 775	498 710	552 995	634 374	648 268	694 703	5,97
Mercedes Benz	0	0	0	0	84	766	20 205	68 727	0,59
Nissan	265 023	300 326	386 973	444 608	465 786	414 031	398 308	308 837	2,66
NUMMI (GM/Toyota)	209 169	256 231	321 428	363 040	352 675	365 469	357 809	361 859	3,17
Subaru-Isuzu	116 297	124 020	126 558	153 883	180 174	194 871	186 891	216 198	1,86
Toyota	187 726	240 382	234 060	275 678	381 445	385 657	431 811	476 203	4,10
Production total	8 599 751	9 491 395	10 590 137	11 906 343	11 625 390	11 531 396	11 792 859	11 627 522	100,00

Production canadienne de véhicules légers par compagnie (unités)

	1991	1992	1993	1994	1995	1996	1997	1998	1998 Part du marché
CAMI (GM/Suzuki)	135 184	125 435	154 650	170 231	183 510	124 100	99 770	45 063	1.79
DaimlerChrysler	491 683	464 523	643 371	695 630	538 097	705 446	687 286	738 321	29.28
Ford	426 030	500 584	473 331	494 829	533 443	537 082	622 571	627 384	24.88
GM	697 516	669 940	747 435	723 903	907 833	752 371	750 340	750 907	29.78
Honda	99 150	104 123	100 621	108 308	106 133	144 482	165 181	179 797	7.13
Hyundai	28 201	15 186	14 585	0	0	0	0	0	0.00
Toyota	67 834	68 092	79 219	85 871	90 136	97 344	108 952	171 739	6.81
Volvo	7 661	6 304	5 504	6 436	7 588	7 127	6 548	8 373	0.33
Production total	1 953 259	1 954 187	2 218 716	2 285 208	2 366 740	2 367 952	2 440 648	2 521 584	100.00

Source: Annuaire Des Rosiers 1999, Ward's AutoInfoBank

Ventilation à l'échelle internationale de l'approvisionnement en pièces d'origine de cinq grands constructeurs d'automobiles*

Tableau 2.7

(Achats auprès des fournisseurs-maison et des fournisseurs indépendants)
(en millions de dollars)

	1965	1970	1975	1980	1985	1989	1990	1993	1994	1995	1996
Achats américains auprès des fournisseurs-maison au Canada	17	454	797	1 604	4 621	4 845	4 621	5 288	4 939	4 569	4 756
Achats canadiens auprès des fournisseurs-maison aux États-Unis	522	1 153	2 209	3 992	8 490	8 494	8 981	6 571	11 409	12 704	15 434
Achats américains auprès des fournisseurs indépendants au Canada	74	487	876	1 253	3 381	3 486	2 661	2 522	2 686	2 939	3 519
Achats canadiens auprès des fournisseurs indépendant aux États-Unis	236	505	1 051	1 226	3 871	6 226	5 647	4 393	8 140	12 787	12 466

* General Motors, Ford, Chrysler (incluant AMC avant 1987), CAMI (commençant en 1989) et Navistar

Valeur des expéditions de l'industrie canadienne de l'automobile
(en millions de dollars)

Tableau 2.6

	1965	1970	1975	1980	1985	1990	1994	1995	1996	1997	1998
Constructeurs de véhicules automobiles	2 120	2 963	6 024	10 071	24 599	27 239	43 632	49 474	47 902	56 509	59 637
Constructeurs de carrosseries et de remorque de camions	103	244	774	978	1 148	1 411	1 517	1 923	2 002	2 132	2 569
Fabricants de pièces et d'accessoires d'automobiles	756*	1 408*	2 552*	4 034	12 923	13 902	18 391	22 333	23 840	25 426	27 720
Fabricants de pneus et de chambres à air**	n.d.	n.d.	n.d.	n.d.	1 653	1 350	1 550	1 744	1 754	1 773	1 940
Total	2 223	3 207	6 798	15 083	40 323	43 902	65 090	75 474	75 498	85 840	91 866

* Y compris les fabricants de tissus et d'accessoires d'automobiles.

** Données fournies par les sociétés.

Note: Les données pour 1997 et 1998 sont basées sur les livraisons préliminaires

Source: *Statistique Canada, n° au catalogue 31-001-XPB, 31-203-XPB et 42-251-XPB.*

**Indices des prix* de l'industrie
(1992 = 100)**

Tableau 2.5

	1992	1993	1994	1995	1996	1997	1998
Constructeurs de véhicules automobiles (CTI 323)	100.0	107.5	114.7	118.7	122.8	127.1	138.5
Carrosseries de camions et de remorques (CTI 324)	100.0	101.8	99.8	105.8	110.0	111.5	112.6
Pièces et accessoires d'automobiles (CTI 325)	100.0	100.5	103.8	107.1	108.7	108.7	112.0

* Les indices des prix des produits industriels (IPI) mesurent les variations de prix principaux produits vendus par les fabricants canadiens.

	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Nombre d'unités construites (en milliers)	1 648	1 780	1 964	1 948	1 887	1 973	2 254	2 321	2 408	2 397	2 571	2 570
Valeur de la production CTI 3231 * (en millions de dollars)	22 154	28 114	27 519	27 239	26 017	29 564	37 657	43 632	50 632	50 473	56 529	59 636
Valeur d'unité (dollars)	13 443	15 794	14 012	13 983	13 787	14 984	16 707	18 799	21 027	21 057	21 987	23 205

* Données préliminaires basées sur celles de Statistique Canada n° au catalogue 31-001-XPB.

Source: Statistique Canada et Ward's Automotive Reports.

Production mondiale de véhicules par constructeur majeures et pays
(en milliers d'unités)

Tableau 2.3

	1965	1970	1975	1980	1985	1990	1995	1996	1997	1998
États-Unis	11 114	8 263	8 965	8 010	11 648	9 780	11 972	11 832	12 149	11 969
Japon	1 876	5 289	6 941	11 043	12 271	13 487	10 195	10 346	11 177	10 976
Allemagne	2 976	3 842	3 186	3 879	4 446	4 661	4 515	4 351	4 537	5 721
France	1 642	2 750	2 861	3 378	3 016	3 295	2 740	2 728	3 047	2 910
Espagne	229	536	814	1 182	1 418	1 679	2 308	2 412	2 531	2 752
Canada	846	1 193	1 442	1 374	1 930	1 922	2 401	2 397	2 578	2 570
Corée du Sud	-	29	36	123	378	1 322	2 679	2 813	2 867	1 994
Grande-Bretagne	2 177	2 098	1 648	1 313	1 311	1 296	1 738	1 929	1 941	1 987
Brésil	185	416	930	1 165	967	914	1 650	1 813	2 067	1 573
Italie	1 176	1 854	1 459	1 612	1 573	1 875	1 623	1 547	1 811	1 657
Mexique	n.d	n.d	n.d	n.d	398	804	944	1 222	1 336	1 439
Russie	634	916	1 964	2 199	2 200	2 000	1 276	1 077	1 264	1 075

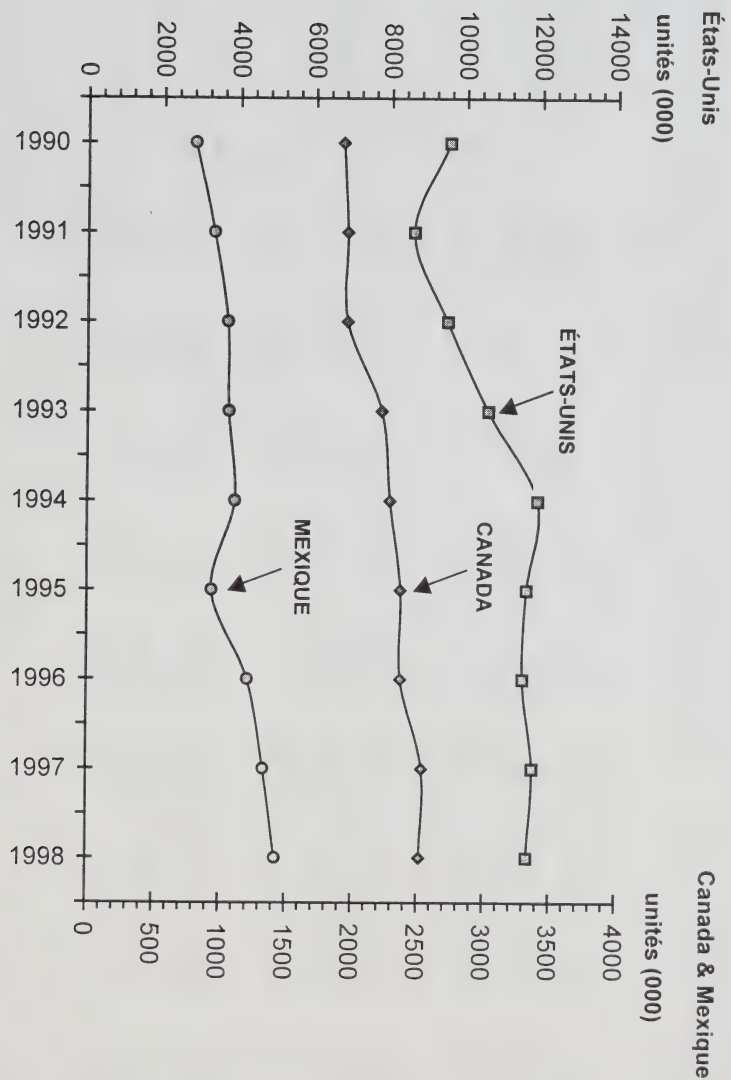
Source: Ward's AutoInfoBank pour le Canada, États-Unis et Mexique; Automotive News pour les autres pays (classé selon la production de 1998).

Entreprises

	Selon		Selon		Selon		Selon	
	1995	1995	1996	1996	1997	1997	1998	1998
Amérique de Nord selon la production en 1998*								
General Motors	5 516	2	4 943	1	5 415	1	4 992	1
Ford	4 233	1	4 233	2	4 308	2	4 326	2
DaimlerChrysler	2 453	3	2 461	3	2 672	3	4 254	3
Toyota	472	6	483	6	467	6	969	4
Honda	659	4	780	4	816	4	895	5
Nissan	572	5	550	5	571	5	529	6
NUMMI	352	7	356	7	422	7	362	7
Volkswagen	192	10	238	8	258	8	339	8
Subaru-Isuzu	180	11	195	9	187	10	216	9
Auto Alliance (anciennement Mazda)	148	12	129	11	110	11	167	10
Diamond Star	218	8	192	10	189	9	157	11
CAMI	194	9	124	12	100	12	45	12
Mondiale, selon la production en 1998								
General Motors	8 800	1	8 400	1	8 198	1	7 560	1
Ford	6 476	2	6 750	2	7 047	2	6 823	2
Toyota	4 694	3	4 756	3	4 890	3	5 290	3
Volkswagen	3 413	4	3 977	4	4 291	4	4 823	4
Chrysler	2 762	6	2 861	5	2 819	7	4 423	5
Fiat	1 740	10	2 586	7	2 886	5	2 660	6
Nissan	2 785	5	2 742	6	2 878	6	2 556	7
Honda	1 750	14	2 084	8	2 316	8	2 330	8
Renault	1 750	9	1 804	10	1 940	11	2 283	9
Peugeot-Citroen	1 888	8	1 147	13	2 052	10	2 270	10
Suzuki	1 655	12	1 789	11	1 875	12	1 672	11
Mitsubishi	2 011	7	1 943	9	2 033	9	1 664	12

* Y compris le Mexique.

Source: Ward's Automotive Reports, Automotive News.



Production Nord-américaine de véhicules moteurs (en millier d'unités)

Tableau 2.1

	1985	1989	1990	1992	1993	1994	1995	1996	1997	1998
Canada										
Voitures	1 183	1 020	1 093	1 032	1 353	1 215	1 337	1 280	1 373	1 481
Camions légers	729	926	828	923	866	1 069	1 029	1 088	1 161	1 040
Véhicules légers	1 912	1 946	1 921	1 955	2 219	2 284	2 366	2 368	2 534	2 521
Camions de poids lourds/autobus*	22	43	15	19	25	36	41	29	37	49
Total des véhicules	1 934	1 989	1 936	1 974	2 244	2 320	2 407	2 397	2 571	2 570
États-Unis										
Voitures	8 155	6 821	6 078	5 667	5 982	6 601	6 340	6 083	5 934	5 554
Camions légers	3 175	3 781	3 464	3 825	4 608	5 305	5 285	5 449	5 859	6 073
Véhicules légers	11 330	10 602	9 542	9 492	10 590	11 906	11 625	11 532	11 793	11 627
Camions de poids lourds/autobus*	277	254	226	217	265	333	370	299	338	342
Total des véhicules	11 607	10 856	9 768	9 709	10 855	12 239	11 995	11 831	12 131	11 969
Mexico										
Voitures	268	439	598	777	835	874	705	798	854	956
Camions légers	177	191	206	274	226	235	230	411	477	446
Véhicules légers	445	630	804	1 051	1 061	1 109	935	1 209	1 331	1 402
Camions de poids lourds/autobus*	12	10	9	35	26	31	5	10	23	37
Totaux des véhicules	457	640	813	1 086	1 087	1 140	940	1 219	1 354	1 439
Total Amérique du Nord										
Voitures	9 606	8 280	7 769	7 476	8 170	8 690	8 382	8 161	8 161	7 991
Camions légers	4 081	4 898	4 498	5 022	5 700	6 609	6 544	6 948	7 497	7 559
Véhicules légers	13 687	13 178	12 267	12 498	13 870	15 299	14 926	15 109	15 658	15 550
Camions de poids lourds/autobus*	311	307	250	271	316	400	416	338	398	428
Total des véhicules	13 998	13 485	12 517	12 769	14 186	15 699	15 342	15 447	16 056	15 978

* Y compris autocaravane et atterissage



PRODUCTION

Concessionnaires canadiens de véhicules légers par assembleurs

Tableau 1.10

Company	1980	1985	1988	1989	1990	1993	1994	1995	1996	1997	1998
Acura	--	--	--	--	41	44	42	39	39	41	48
American Motors	256	189	--	--	--	--	--	--	--	--	--
BMW	39	43	43	42	38	35	36	33	33	30	31
Chrysler	566	555	722	695	659	601	607	609	598	586	570
Daewoo	--	--	--	--	--	--	--	--	--	--	11
Fiat	53	88	--	--	--	--	--	--	--	--	--
Ford	781	715	680	669	655	643	640	623	604	597	577
General Motors	1 091	969	969	964	947	906	868	847	824	868	848
Honda	160	188	268	256	218	217	213	205	203	203	206
Hyundai	--	173	172	157	144	156	146	139	139	142	143
Infiniti *	--	--	--	--	--	23	22	22	23	--	--
Jaguar	97	20	21	23	23	21	21	20	18	18	19
Lada	44	76	57	61	69	78	77	89	75	22	21
Land Rover	--	--	--	--	--	--	--	--	--	--	13
Lexus **	--	--	--	--	--	22	22	22	22	--	--
Mazda	130	137	164	168	176	184	181	176	167	159	151
Mercedes	57	53	51	54	56	39	57	58	56	53	49
Nissan	212	188	187	180	179	161	156	148	146	169	165
Passport/Saturn ***	--	--	40	59	70	66	65	62	--	--	--
Porche	--	--	--	--	--	--	--	--	--	--	11
Saab***	52	41	30	32	--	--	--	--	--	--	--
Skocar	--	60	27	23	34	--	--	--	--	--	--
Subaru	102	80	81	89	87	87	93	95	97	100	97
Suzuki	--	86	99	103	107	103	106	108	91	86	89
Toyota	195	208	233	237	239	234	232	229	228	251	251
Volkswagen/Audi	202	200	192	189	184	180	174	162	160	155	190
Volvo	94	72	64	61	61	53	51	48	46	46	45
Total Light Vehicle Dealers	4 131	4 141	4 100	4 062	3 987	3 853	3 809	3 734	3 569	3 526	3 535

* Chiffres sont inclus avec Nissan après 1996.

* Chiffres sont inclus avec Toyota après 1996.

* Chiffres sont inclus avec General Motors commençant en 1990.

Source: Canadian Vehicle Manufacturers' Association (CVMA), DesFosiers Automotive Yearbook.

Les 15 plus populaires camions légers au Canada - 1997 et 1998
(unités)

Tableau 1.9

Camions Légers				
	1998		1997	
1	Ford F-Series	1	Ford F-Series	80 952
2	Dodge Caravan	2	Dodge Caravan	53 028
3	Ford Windstar	3	Ford Windstar	52 114
4	Chevy CK Pickup	4	Chevy CK Pickup	46 756
5	GMC-Sierra	5	GMC-Sierra	39 458
6	Plymouth Voyager	6	Plymouth Voyager	37 279
7	Dodge Ram Pickup	7	Dodge Ram Pickup	30 823
8	Ford Explorer	8	Ford Explorer	23 013
9	Pontiac Trans Sport	9	Chevrolet Venture	19 845
10	Chevrolet Venture	10	Jeep Grand Cherokee	17 171
11	Jeep Grand Cherokee	11	Chevrolet Astro	15 280
12	Toyota Sienna	12	Honda CR-V	14 778
13	Honda CR-V	13	GMC Safari Van	13 925
14	Dodge Dakota	14	Ford Econoline	13 276
15	Ford Econoline	15	Pontiac Trans Sport	12 160

VOITURES

1998		1997	
1	Honda Civic	1	Chevrolet Cavalier
2	Chevrolet Cavalier	2	Honda Civic
3	Pontiac Sunfire	3	Pontiac Sunfire
4	Toyota Corolla	4	Ford Escort
5	Chrysler Neon	5	Toyota Corolla
6	Ford Escort	6	Chrysler Neon
7	Honda Accord	7	Toyota Camry
8	Chevrolet Malibu	8	Pontiac Grand Am
9	Ford Taurus	9	Ford Taurus
10	Toyota Tercel	10	Dodge Intrepid
11	Toyota Camry	11	Honda Accord
12	Dodge Intrepid	12	Saturn
13	Saturn	13	Chevrolet Lumina
14	Pontiac Grand Am	14	Toyota Tercel
15	Mazda Protegé	15	Ford Contour

Immatriculations de véhicules dans les marchés majeures
(en milliers d'unités)

Tableau 1.7

	1965	1970	1975	1980	1985	1990	1994	1995	1996	1997
Australia	3 737	4 784	6 214	7 263	8 729	9 777	10 518	11 207	10 750	11 664
Belguim	N/A	2 351	2 936	3 513	3 634	4 277	4 673	4 755	4 838	4 862
Canada	6 411	8 083	11 028	13 719	14 818	16 553	17 440	17 046	17 231	17 478
France	10 815	14 370	17 810	21 705	25 070	28 460	30 040	30 295	30 755	31 267
Germany	10 739	15 605	19 499	24 853	27 822	32 685	42 878	43 561	44 167	44 551
Italy	6 137	11 111	16 253	19 115	24 405	29 910	32 578	32 807	33 516	33 996
Japan	6 300	17 582	28 091	37 856	46 157	57 678	65 011	66 854	68 801	72 857
Netherlands	1 515	2 777	2 741	4 889	5 330	6 091	6 571	6 290	6 420	6 670
Spain	1 195	3 119	5 860	8 962	10 884	14 443	16 687	17 284	17 954	18 657
Sweden	1 935	2 447	2 931	3 077	3 383	3 925	3 912	3 953	3 981	4 040
U.K.	10 880	13 571	15 995	17 358	22 231	26 302	27 437	27 942	28 486	28 816
Mexico	N/A	1 792	3 340	5 829	7 476	9 882	11 530	11 825	12 230	12 700
U.S.	90 358	108 418	132 949	188 796	171 354	188 656	195 469	200 446	206 365	207 754
Total	150 022	206 010	265 647	356 935	371 293	428 639	464 744	474 265	485 494	495 312

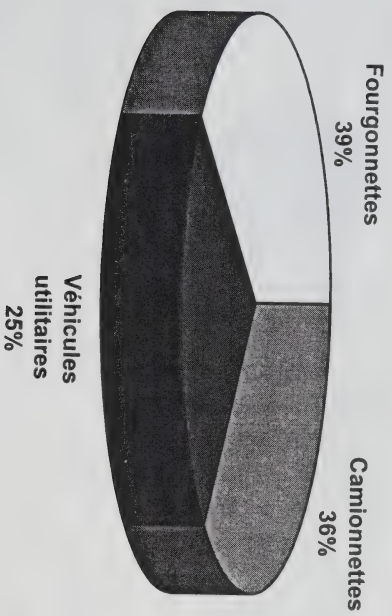
Source: World Motor Vehicle Data, 1998; American Automobile Manufacturers' Association (AAMA)

	1980	1985	1987	1988	1989	1990	1993	1994	1995	1996	1997
Automobilies	10 256	11 118	11 773	12 086	12 811	12 622	12 925	13 131	13 192	13 251	13 487
Camions et camions-tracteurs	2 903	3 095	3 508	3 706	3 396	3 867	3 345	3 393	3 411	3 476	3 527
Autobus	53	53	59	60	62	64	65	65	64	64	65
Motocyclettes	389	453	414	370	348	331	309	306	297	290	299
Véломoteurs	*n.d.	35	34	31	30	28	26	24	22	21	20
Autres véhicules	118	64	76	84	72	69	61	63	60	60	80
Total	13 719	14 818	15 864	16 337	16 719	16 981	16 731	16 982	17 046	17 162	17 478

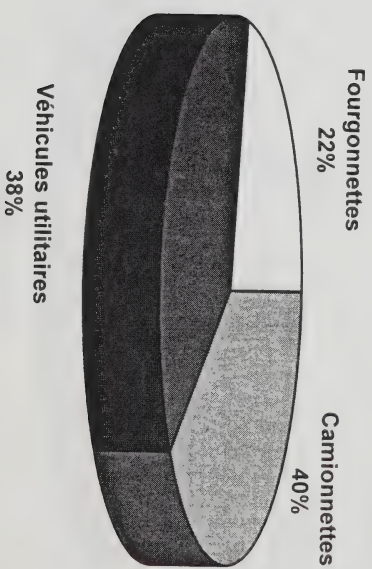
* Non disponible

Source: Statistique Canada, n° au catalogue 53-219-XPB.

CANADA



ÉTATS-UNIS



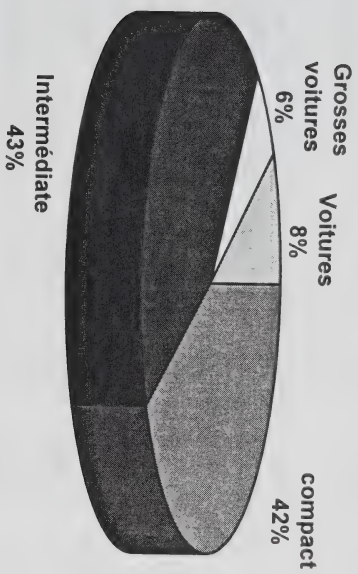
Ventes de camions légers au Canada et aux États-Unis par segmentation (unités)

Tableau 1.5

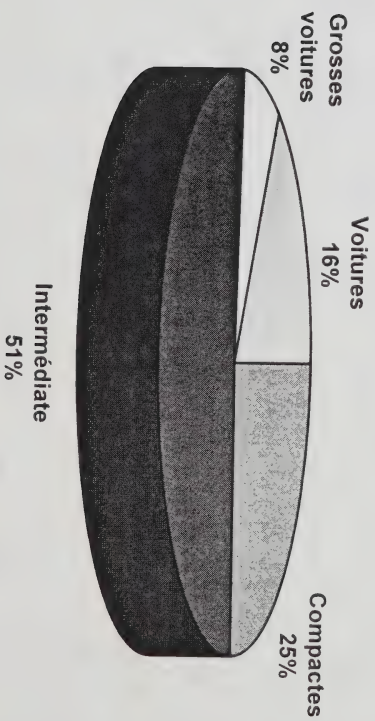
	1990	1991	1992	1993	1994	1995	1996	1997	1998
Canada*									
Camionnettes	185 369	171 729	164 548	164 707	189 060	179 914	201 156	241 052	233 685
Pourcent du marché	46.1	43.7	40.6	38.5	39.8	38.2	39.2	37.1	36.0
Change en pourcentage		-7.4	-4.2	0.1	14.8	-4.8	11.8	19.8	-3.1
Véhicule utilitaire sports	71 413	73 064	73 053	77 007	79 480	88 258	98 379	150 455	159 590
Pourcent du marché	17.8	18.6	18.0	18.0	16.7	18.7	19.2	23.2	24.6
Change en pourcentage		2.3	0.0	5.4	3.2	11.0	11.5	52.9	6.1
Fourgonnettes	145 198	147 781	167 260	186 090	206 857	203 005	213 810	258 280	256 280
Pourcent du marché	36.1	37.6	41.3	43.5	43.5	43.1	41.7	39.7	39.5
Change en pourcentage		1.8	13.2	11.3	11.2	-1.9	5.3	20.8	-0.8
Total des ventes	401 980	392 574	404 861	427 804	475 397	471 177	513 345	649 787	649 555
Change en pourcentage		-2.3	3.1	5.7	11.1	-0.9	8.9	26.6	0.0
États-Unis*									
Camionnettes	2 342 820	2 051 816	2 180 896	2 457 399	2 837 267	2 697 398	2 847 384	2 804 665	2 991 899
Pourcent du marché	51.1	49.5	46.8	45.7	46.8	44.3	43.3	40.9	40.4
Change en pourcentage		-12.4	6.3	12.7	15.5	-4.9	5.6	-1.5	6.7
Véhicule utilitaire sports	929 066	909 072	1 133 141	1 379 600	1 556 075	1 753 417	2 140 455	2 435 301	2 794 206
Pourcent du marché	20.3	21.9	24.3	25.7	25.6	28.8	32.6	35.6	37.8
Change en pourcentage		-2.2	24.6	21.8	12.8	12.7	22.1	13.8	14.7
Fourgonnettes	1 315 007	1 181 136	1 341 062	1 541 122	1 674 719	1 642 269	1 582 590	1 609 681	1 615 181
Pourcent du marché	28.7	28.5	28.8	28.7	27.6	27.0	24.1	23.5	21.8
Change en pourcentage		-10.2	13.5	14.9	8.7	-1.9	-3.6	1.7	0.3
Total des ventes	4 586 893	4 142 024	4 655 099	5 378 121	6 068 061	6 093 084	6 570 429	6 849 647	7 401 286
Change en pourcentage		-9.7	12.4	15.5	12.8	0.4	7.8	4.2	8.1

* Atterissages commerciaux ne sont pas inclus

CANADA



ÉTATS-UNIS



Ventes d'automobiles nord-américaines aux États-Unis, selon la taille
(en milliers d'unités)

Tableau 1.4

	1980	1985	1990 *	1991 *	1992 *	1993 *	1994 *	1995 *	1996 *	1997 *	1998 *
Compactes	2 816	3 494	3 012	2 778	2 732	2 773	2 623	2 339	2 313	2 176	2 008
Pourcent du marché	31.5	31.8	32.4	33.9	33.3	32.6	29.2	27.1	27.1	26.3	24.7
Change en pourcentage		24.1	-6.8	-7.8	-1.7	1.5	-5.4	-10.8	-1.1	-5.9	-7.7
Intermédiaires	4 441	5 110	4 146	3 562	3 605	3 696	4 098	4 191	4 223	4 093	4 164
Pourcent du marché	49.6	46.5	44.6	43.5	43.9	43.4	45.6	48.5	49.5	49.5	51.1
Change en pourcentage		15.1	-4.5	-14.1	1.2	2.5	10.9	2.3	0.8	-3.1	1.7
Grosses voiture	1 166	1 299	877	685	752	943	1 054	932	843	782	669
Pourcent du marché	13.0	11.8	9.4	8.4	9.2	11.1	11.7	10.8	9.9	9.5	8.2
Change en pourcentage		11.4	-16.3	-21.9	9.8	25.4	11.8	-11.6	-9.5	-7.2	-14.5
Voitures de luxe	526	1 077	1 268	1 164	1 124	1 106	1 216	1 173	1 147	1 221	1 301
Pourcent du marché	5.9	9.8	13.0	13.8	13.5	13.0	13.5	13.6	13.5	14.8	16.0
Change en pourcentage		104.8	9.8	-8.2	-3.4	-1.6	9.9	-3.5	-2.2	6.5	6.6
Total des ventes	8 949	10 980	9 303	8 189	8 213	8 518	8 991	8 635	8 526	8 272	8 142

* Avant 1988, les modèles importés ne sont pas inclus; voir Tableau 1.2 pour les ventes totales des importations pour ces années.
Les statistiques pour les années antérieures à 1980 sont incomplètes

Source: Bulletin hebdomadaire et annuaire de Ward's

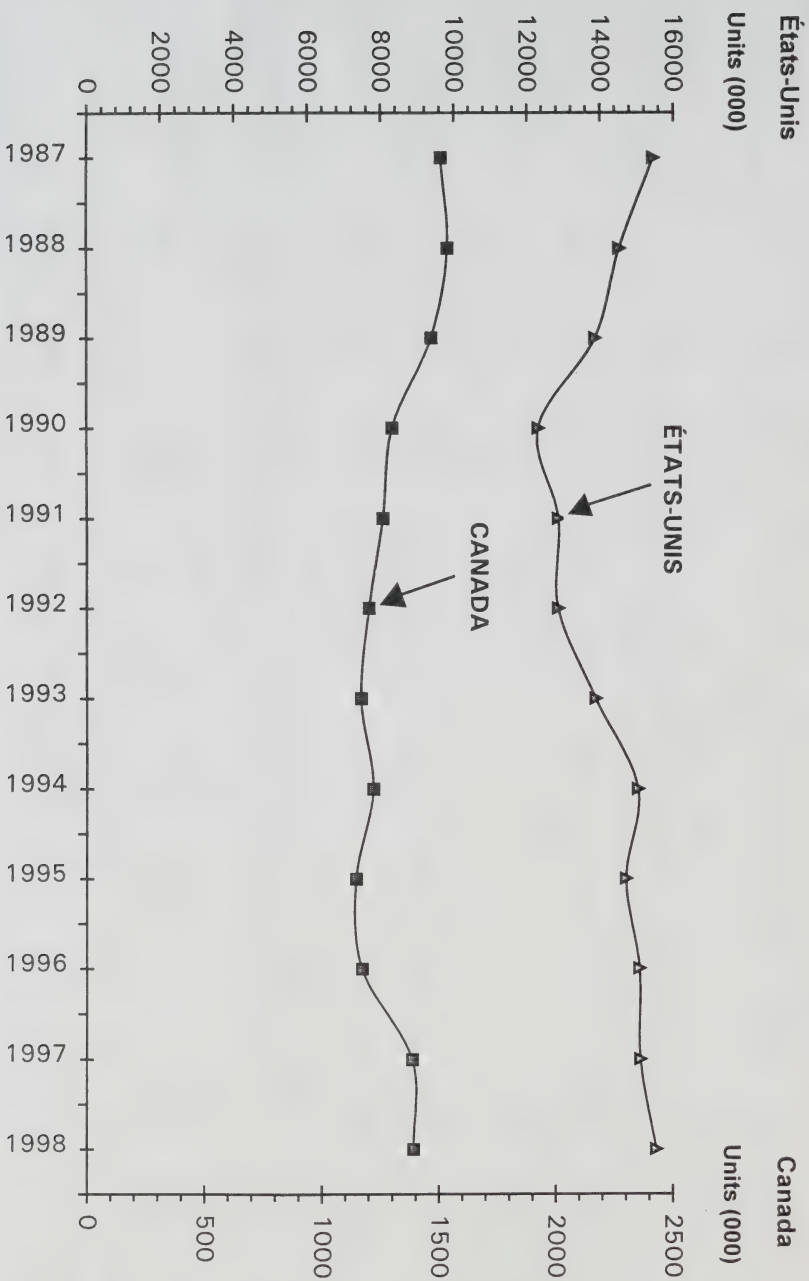
Ventes au Canada d'automobiles selon la taille, par des sociétés nord-américaines
(en milliers d'unités)

Tableau 1.3

	1970	1975	1980	1985	1990*	1993*	1994*	1995*	1996*	1997*	1998*
Compactes	110	261	369	439	483	347	320	281	275	308	311
<i>Pourcent du marché</i>	22.2	36.0	49.8	56.1	54.6	46.8	43.0	41.5	41.9	41.8	41.9
<i>Change en pourcentage</i>		1.4	142.8	86.8	10.0	-10.6	-7.8	-12.2	-2.1	12.0	1.0
Intermédiaires	156	229	206	246	279	290	304	287	277	312	319
<i>Pourcent du marché</i>	31.5	31.6	27.8	31.5	31.5	39.1	40.9	42.4	42.2	42.3	43.0
<i>Change en pourcentage</i>		46.8	-10.0	19.4	13.4	3.9	4.8	-5.6	-3.5	12.6	2.2
Gross voitures	215	223	148	80	77	58	73	62	55	51	47
<i>Pourcent du marché</i>	43.4	30.8	20.0	10.2	8.7	7.8	9.8	9.2	8.4	6.9	6.3
<i>Change en pourcentage</i>		3.7	-33.6	-45.9	-3.8	-24.7	25.9	-15.1	-11.3	-7.3	-7.8
Voitures de luxe	14	12	18	17	46	46	47	47	50	66	65
<i>Pourcent du marché</i>	2.8	1.7	2.4	2.2	5.2	6.2	6.3	6.9	7.6	9.0	8.8
<i>Change en pourcentage</i>		-14.3	50.0	-5.6	170.6	0.0	2.2	0.0	6.4	32.0	-1.5
Total des ventes	495	725	741	782	885	741	744	677	657	737	742

* Avant 1990, les modèles importés ne sont pas inclus; voir Tableau 1.1 pour les ventes des importations pour ces années.

Source: La Société des fabricants de véhicules à moteur classifié selon la segmentation de Ward.



Ventes au détail de véhicules automobiles aux États-Unis
(en millier d'unités)

Tableau 1.2

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Voitures de tourisme											
Produit en Amérique du Nord*	7 540	7 095	6 914	6 152	6 286	6 742	7 255	7 129	7 254	6 907	6 764
Trois Grands	6 735	6 042	5 482	4 676	4 816	5 156	5 414	5 138	5 002	4 735	4 674
Japonais	592	779	1 061	1 125	1 161	1 265	1 447	1 595	1 840	1 827	1 891
Autres	213	274	371	351	309	321	394	396	412	345	199
Importations total	3 004	2 680	2 384	2 023	1 928	1 775	1 735	1 506	1 274	1 365	1 379
Importations des trois grands	393	341	297	255	203	166	143	74	46	59	84
Du Japon	230	211	191	156	143	117	34	15	7	0	0
D'autres sources	163	130	106	99	60	49	40	59	39	59	84
Autres Importations	2 611	2 339	2 087	1 768	1 725	1 609	1 661	1 432	1 228	1 306	1 295
Du Japon	1 792	1 687	1 529	1 345	1 309	1 211	1 205	967	721	726	691
D'autres sources **	819	652	558	423	416	398	456	465	507	580	604
Voitures de tourisme total	10 544	9 775	9 298	8 175	8 214	8 517	8 990	8 635	8 528	8 272	8 143
Camions légers											
Produit en Amérique du Nord*	4 200	4 114	3 957	3 604	4 247	5 000	5 658	5 691	6 129	6 267	6 745
Trois Grands	4 083	3 978	3 761	3 385	3 937	4 579	5 138	5 208	5 612	5 746	6 183
Japonais	117	131	162	188	277	379	474	441	460	460	518
Autres	0	5	34	31	33	42	46	42	57	61	44
Importations total	711	641	612	538	408	378	410	403	441	582	658
Importations des trois grands	66	47	16	7	9	6	5	4	3	3	3
Du Japon	66	47	16	7	9	6	5	4	3	3	3
D'autres sources	0	0	0	0	0	0	0	0	0	0	0
Autres Importations	645	594	596	531	399	372	405	399	438	579	655
Du Japon	635	583	584	523	392	361	388	369	404	533	603
D'autres sources	10	11	12	8	7	11	17	30	34	46	52
Camions légers total	4 911	4 755	4 569	4 142	4 655	5 378	6 068	6 094	6 570	6 849	7 403
Véhicules légers total	15 455	14 530	13 867	12 317	12 869	13 895	15 058	14 729	15 098	15 121	15 546

* Y inclus le Mexique

** Y inclus Saab et Jaguar

Ventes au détail de véhicules automobiles au Canada (en milliers d'unités)

Tableau 1.1

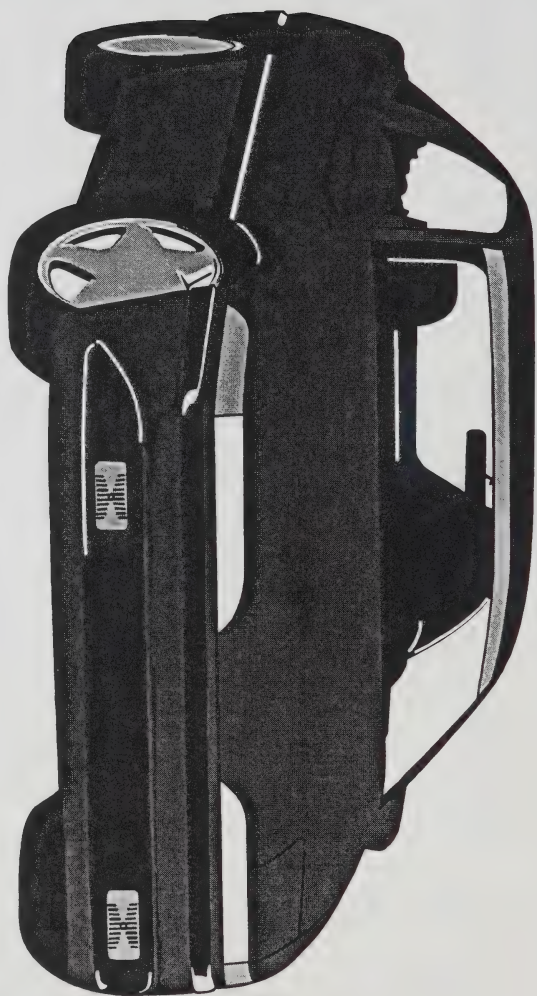
	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Voitures de tourisme												
Produit en Amérique du Nord*												
Trois Grands	711	732	661	578	557	513	533	533	557	571	631	591
Japonais	691	708	622	514	487	436	440	440	428	409	437	404
Autres	12	18	35	54	63	62	73	73	108	134	161	148
	8	6	4	10	7	15	20	20	21	28	33	39
Importations total												
Importations des trois grands	347	312	326	308	317	285	206	206	116	89	108	151
Du Japon	39	42	57	51	57	57	35	35	10	4	3	5
D'autres sources	35	38	47	42	49	39	25	25	6	1	0	0
	4	4	10	9	8	18	10	10	4	3	3	5
Autres importations												
Du Japon	308	270	269	257	260	228	171	171	106	85	105	146
D'autres sources **	200	190	196	193	198	183	131	131	66	48	65	98
	108	80	73	64	62	45	40	40	40	37	40	48
Voitures de tourisme totale	1 058	1 044	987	886	874	798	739	739	673	660	739	742
Camions légers												
Produit en Amérique du Nord*												
Trois Grands	397	440	415	350	335	356	379	379	444	488	593	594
Japonais	397	440	415	348	332	353	373	373	432	475	575	560
Autres	0	0	0	2	3	3	6	6	12	13	18	31
	0	0	0	0	0	0	0	0	0	0	0	3
Importations total												
Importations des trois grands	51	52	64	63	65	57	47	47	23	24	56	56
Du Japon	4	5	7	6	4	4	2	2	0	0	0	0
D'autres sources	4	5	7	6	4	4	2	2	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0
Autres importations												
Du Japon	47	47	57	57	61	53	45	45	23	24	56	56
D'autres sources	46	46	56	56	60	51	42	42	21	22	53	54
	1	1	1	1	1	2	3	3	2	2	3	2
Camions légers total	448	492	479	413	400	413	426	426	467	512	649	650
Véhicules légers totale	1 506	1 536	1 466	1 299	1 274	1 211	1 165	1 165	1 140	1 172	1 388	1 392

* Y inclus le Mexique

** Y inclus Saab et Jaguar

Source: Ward's AutoInfoBank et bulletin hebdomadaire, AIA/MC

Ventes



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Cette édition contient les plus récentes révisions et estimés fournis par les diverses sources de données. Par conséquence, quelques chiffres historiques qui apparaissent dans l'édition 1998 ont été modifiés.

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Formulaire pour obtenir les produits de la Direction générale des industries de l'automobile et des transports, Industrie Canada

Veuillez indiquer quelles informations vous désirez obtenir et compléter l'information ci-dessous.

- ☐ **Cadre de compétitivité sectorielle, l'industrie automobile - Partie I - Vue d'ensemble et perspectives** (septembre 1996)
une revue exhaustive de la structure, de la performance, ainsi que les faits saillants du secteur automobile canadien.
- ☐ **Circulaire trimestrielle sur le secteur automobile**
statistiques sur les ventes, la production, l'emploi et les prévisions de l'industrie.
- ☐ **Commerce dans le secteur automobile** (annuel)
données sur le commerce international par pays et sous-secteur.
- ☐ **Examen de la compétitivité de l'industrie automobile. Rapport sur l'industrie automobile canadienne** (juin 1998)
- une revue consultatif sur la compétitivité de l'industrie
- ☐ **Examen de la compétitivité de l'industrie automobile Questions soulevées par l'industrie** (juin 1998)
- questions présentées par l'industrie
- ☐ **L'industrie canadienne de l'automobile** (brochure) (octobre 1999)
faits saillants sur le secteur de l'automobile (disponible en anglais, français allemand et japonais).
- ☐ **Profil des politiques automobiles par pays** (mai 1997)
- profils sur pays sélectionnés qui incluent la production et ventes et l'environnement du commerce par pays.
- ☐ **Revue statistique sur l'industrie canadienne de l'automobile** (annuel)
données historiques sur la production, les ventes, le commerce, l'investissement, l'emploi et un inventaire des usines d'assemblage.

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Compagnie: _____

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Nom:

Titre:

Compagnie:

Rue:

Ville:

Province:

Code postale:

Vos activités: fournisseur de services, organisation travaillant à R&D, organism gouvernemental (fédéral, provincial, municipal), autres (décrivez vos activités)

4. Avez-vous d'autres commentaires qui pourraient nous aider à améliorer nos produits futurs?

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2. Quelle information avez-vous trouvé particulièrement utile?

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OU

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235 rue Queen
Ottawa (Ontario) K1A 0H5

**REVUE STATISTIQUE
SUR L'INDUSTRIE CANADIENNE
DE L'AUTOMOBILE, ÉDITION 1999**

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REVUE STATISTIQUE
SUR L'INDUSTRIE CANADIENNE
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STATISTICAL REVIEW
OF THE CANADIAN AUTOMOTIVE
INDUSTRY: 2000 EDITION



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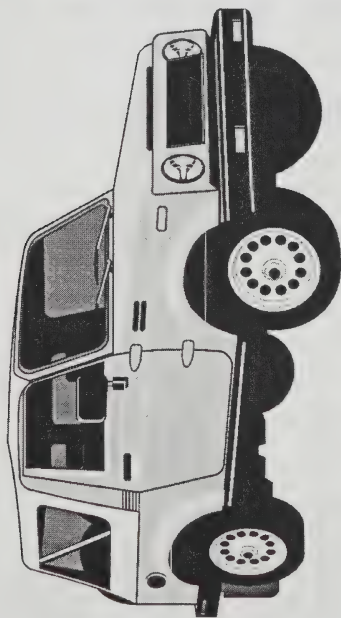
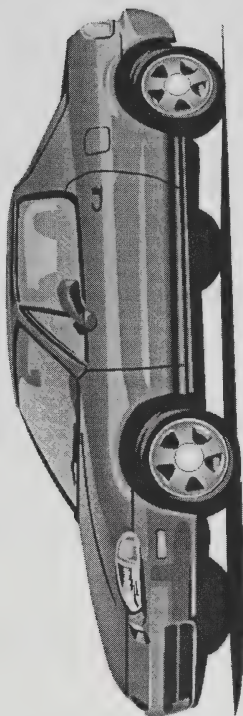
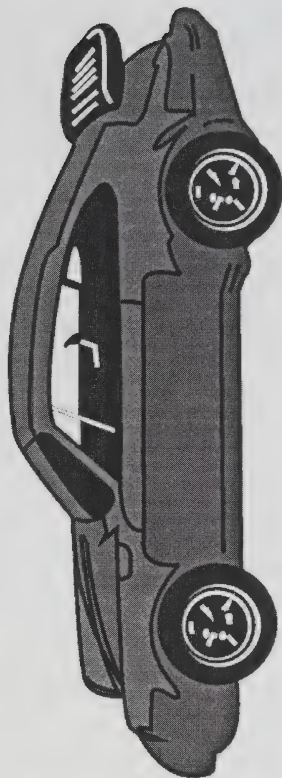
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This edition reflects the latest revisions and estimates provided by the various data sources. Accordingly, some historical figures appearing in the 1999 Edition have been modified. As a variety of sources are utilized in this publication, some totals may not agree.

Sales



	1991	1992	1993	1994	1995	1996	1997	1998	1999
Passenger Cars									
North American Produced*									
Daimler Chrysler	356	298	300	361	355	373	426	405	447
Ford	92	75	88	101	91	85	87	86	85
General Motors	143	124	124	124	109	113	115	99	88
Honda	262	235	214	235	227	215	242	222	258
Honda	28	29	31	41	41	59	75	72	90
Mazda	8	6	12	11	8	6	7	6	5
Nissan	9	9	13	16	14	12	12	13	12
Toyota	20	19	10	33	40	50	57	49	45
Other	29	25	20	25	25	31	33	43	37
Total Imports	286	279	229	165	115	89	109	152	186
Total Imports from Europe	24	21	25	24	23	20	24	30	47
Total Imports from Japan	233	229	183	118	70	50	65	98	105
Total Imports from South Korea	25	27	21	23	22	19	20	24	34
From Other Sources	4	2	0	0	0	0	0	0	0
Total Passenger Cars	642	577	529	526	470	462	535	557	633
Light Trucks									
North American Produced*									
Daimler Chrysler	135	136	142	174	165	174	221	2 382	12 380
Ford	96	106	118	130	128	153	169	183	180
General Motors	130	132	135	161	153	161	199	170	188
Honda	0	0	0	0	0	0	0	199	213
Mazda	0	0	0	7	4	4	4	2151	12130
Nissan	0	0	4	3	4	5	5	4	5
Toyota	0	0	0	0	2	2	6	18	19
Other	5	4	3	3	2	2	3	6	8
Total Imports	62	54	45	30	23	25	57	56	58
Total Imports from Europe	1	2	3	2	2	2	3	2	1
Total Imports from Japan	61	52	42	28	21	23	54	54	56
From Other Sources	0	0	0	0	0	0	0	0	1
Total Light Trucks	197	190	187	204	188	199	278	2 438	12 438
Total Light Vehicles	839	767	716	730	658	661	813	2 995	13 071

* Includes Mexico

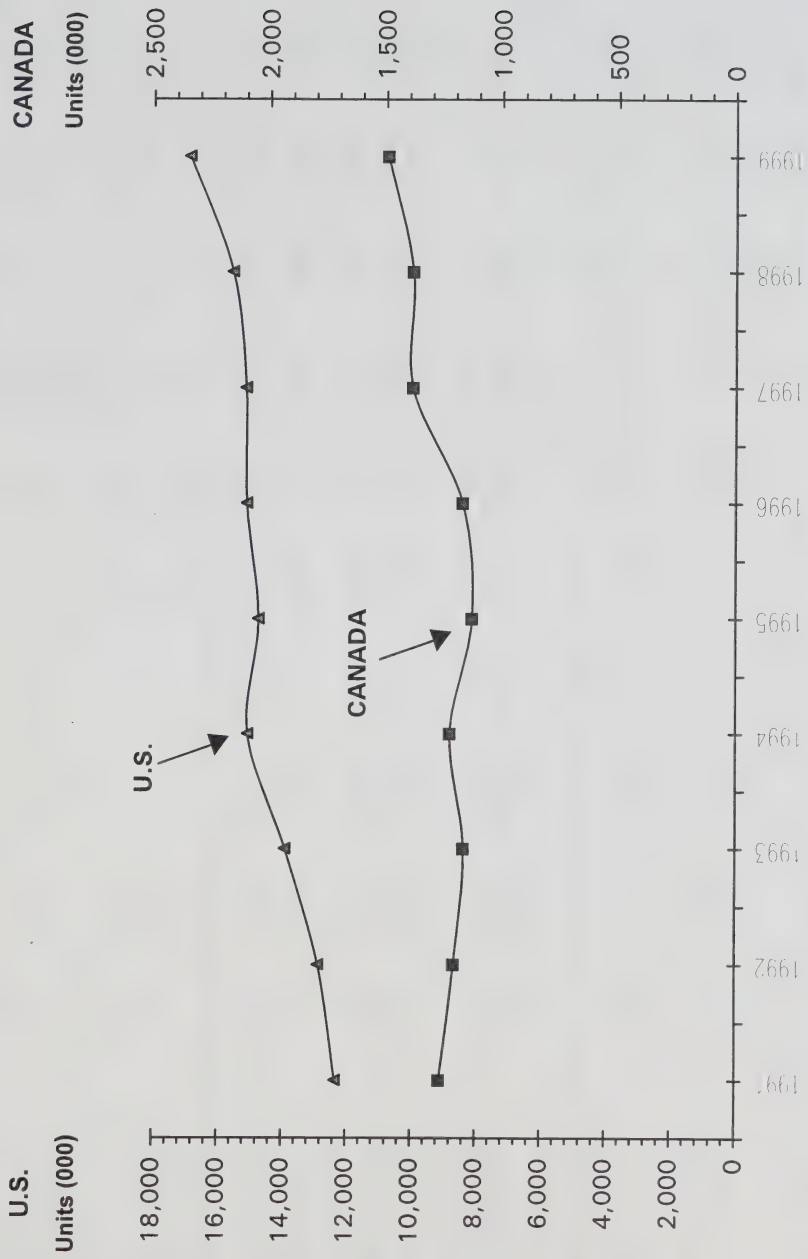
Source: Ward's AutoInfoBank

Table 1.2

Retail Sales of New Light Vehicles in US
(Thousands of Units)

	1991	1992	1993	1994	1995	1996	1997	1998	1999
Passenger Cars									
North American Produced*	6 161	6 287	6 742	7 255	7 129	7 256	6 916	6 762	6 980
Daimler Chrysler	637	617	766	783	771	828	737	739	745
Ford	1 582	1 731	1 837	1 899	1 732	1 700	1 576	1 532	1 581
General Motors	2 784	2 750	2 852	3 053	2 931	2 756	2 635	2 401	2 537
Honda	482	476	418	465	511	666	665	731	703
Mazda	77	79	100	109	106	86	79	92	87
Mitsubishi	69	65	76	117	101	126	101	102	137
Nissan	113	146	250	313	300	309	293	252	218
Toyota	334	341	368	384	499	556	594	623	637
Other	83	82	75	132	178	229	236	290	335
Total Imports	2 029	1 927	1 776	1 735	1 506	1 271	1 355	1 380	1 719
Total Imports from Europe	310	308	292	312	340	372	436	528	674
Total Imports from Japan	1 505	1 452	1 328	1 239	982	726	726	691	758
Total Imports from South Korea	179	144	135	173	183	172	182	152	277
From Other Sources	35	23	21	11	1	1	11	9	10
Total Passenger Cars	8 190	8 214	8 518	8 990	8 635	8 527	8 271	8 142	8 699
Light Trucks									
North American Produced*	3 605	4 247	5 000	5 659	5 691	6 132	6 271	6 745	7 421
General Motors	1 405	1 545	1 746	1 943	1 895	1 972	2 040	2 110	2 379
Ford	1 212	1 397	1 663	1 850	1 977	2 070	2 172	2 300	2 385
Daimler Chrysler	800	1 028	1 212	1 392	1 378	1 618	1 567	1 771	1 893
Honda	0	0	0	26	28	28	23	33	101
Mazda	11	8	30	64	45	43	38	42	39
Nissan	130	130	156	173	181	174	169	122	189
Toyota	1	65	112	130	113	142	161	234	297
Other	46	74	81	81	74	85	101	133	138
Total Imports	538	408	378	410	402	439	580	656	775
Total Imports from Europe	8	7	11	17	21	24	26	23	33
Total Imports from Japan	530	401	367	393	373	405	534	604	690
From Other Sources	0	0	0	0	8	10	20	29	52
Total Light Trucks	4 143	4 655	5 378	6 069	6 093	6 571	6 851	7 401	8 196
Total Light Vehicles	12 333	12 869	13 896	15 059	14 728	15 098	15 122	15 543	16 895

* includes Mexico



Canadian Car Sales by Size
(Thousands of Units)

Table 1.3

	1970*	1975*	1980*	1985*	1990	1994	1995	1996	1997	1998	1999
Compact	110	261	369	439	483	320	281	275	308	311	339
Percent Share of Total	22.2	36.0	49.8	56.1	54.6	43.0	41.5	41.9	41.8	42.0	42.0
Percentage Change		137.3	41.4	19.0	10.0	-7.8	-12.2	-2.1	12.0	1.0	9.0
Intermediate	156	229	206	246	279	304	287	277	312	318	344
Percent Share of Total	31.5	31.6	27.8	31.5	31.5	40.9	42.4	42.2	42.3	42.9	42.6
Percentage Change		46.8	-10.0	19.4	13.4	4.8	-5.6	-3.5	12.6	1.9	8.2
Full-size	215	223	148	80	77	73	62	55	51	47	48
Percent Share of Total	43.4	30.8	20.0	10.2	8.7	9.8	9.2	8.4	6.9	6.3	5.9
Percentage Change		3.7	-33.6	-45.9	-3.8	25.9	-15.1	-11.3	-7.3	-7.8	2.1
Luxury	14	12	18	17	46	47	47	50	66	65	76
Percent Share of Total	2.8	1.7	2.4	2.2	5.2	6.3	6.9	7.6	9.0	8.8	9.4
Percentage Change		-14.3	50.0	-5.6	170.6	2.2	0.0	6.4	32.0	-1.5	16.9
Total Sales	495	725	741	782	885	744	677	657	737	741	807

* Prior to 1990, data does not include import models; see Table 1.1 for total import sales for those years.

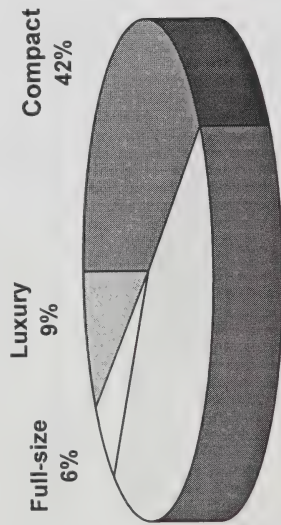
Source: Canadian Vehicle Manufacturers' Association and AIAMC, classified by Ward's segmentation, Ward's AutoInfoBank.

	1980*	1985*	1990	1991	1992	1994	1995	1996	1997	1998	1999
Compact	2 816	3 494	3 012	2 778	2 732	2 623	2 339	2 313	2 176	2 009	2 106
Percent Share of Total	31.5	31.8	32.4	33.9	33.3	29.2	27.1	27.1	26.3	24.7	24.2
Percentage Change		24.1	-6.8	-7.8	-1.7	-5.4	-10.8	-1.1	-5.9	-7.7	4.8
Intermediate	4 441	5 110	4 146	3 562	3 605	4 098	4 191	4 223	4 093	4 163	4 500
Percent Share of Total	49.6	46.5	44.6	43.5	43.9	45.6	48.5	49.5	49.5	51.1	51.7
Percentage Change		15.1	-4.5	-14.1	1.2	10.9	2.3	0.8	-3.1	1.7	8.1
Full-size	1 166	1 299	877	685	752	1 054	932	843	782	669	660
Percent Share of Total	13.0	11.8	9.4	8.4	9.2	11.7	10.8	9.9	9.5	8.2	7.6
Percentage Change		-5.9	-16.3	-21.9	9.8	11.8	-11.6	-9.5	-7.2	-14.5	-1.3
Luxury	526	1 077	1 268	1 164	1 124	1 216	1 173	1 147	1 221	1 301	1 432
Percent Share of Total	5.9	9.8	13.6	14.2	13.7	13.5	13.6	13.5	14.8	16.0	16.5
Percentage Change		104.8	9.8	-8.2	-3.4	9.9	-3.5	-2.2	6.5	6.6	10.1
Total Sales	8 949	10 980	9 303	8 189	8 213	8 991	8 635	8 526	8 272	8 142	8 698

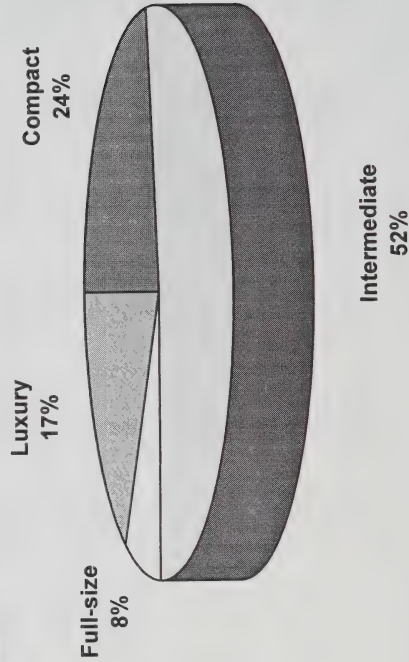
* Prior to 1988, data does not include import models; see Table 1.2 for total imports for those years.
Data incomplete prior to 1980.

Source: Ward's Automotive Reports, Ward's Yearbook, Ward's AutoInfoBank.

CANADA



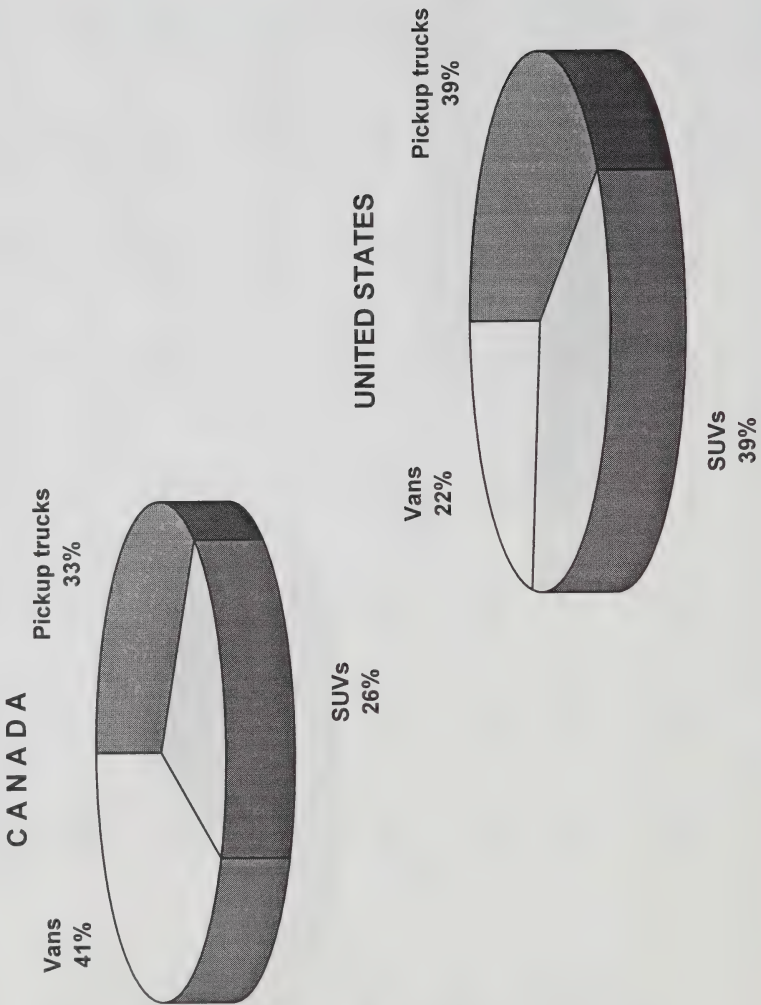
UNITED STATES



	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Canada*										
Pickup trucks	185 369	170 980	163 789	164 032	188 246	179 073	196 444	238 303	232 876	226 802
Percent Share of Total	46.1	43.6	40.5	38.4	39.7	38.1	38.6	36.8	35.9	33.0
Percentage Change		-7.8	-4.2	0.1	14.8	-4.9	9.7	21.3	-2.3	-2.6
Sports Utility Vehicles	71 413	73 064	73 053	77 007	79 480	88 258	98 380	150 342	159 590	179 192
Percent Share of Total	17.8	18.6	18.1	18.0	16.7	18.8	19.3	23.2	24.6	26.1
Percentage Change		2.3	0.0	5.4	3.2	11.0	11.5	52.8	6.2	12.3
Vans	145 198	147 781	167 297	186 090	206 857	203 005	213 810	258 437	256 280	281 659
Percent Share of Total	36.1	37.7	41.4	43.6	43.6	43.2	42.0	39.9	39.5	41.0
Percentage Change		1.8	13.2	11.2	11.2	-1.9	5.3	20.9	-0.8	9.9
Total	401 980	391 825	404 139	427 129	474 583	470 336	508 634	647 082	648 746	687 653
Percentage Change		-2.5	3.1	5.7	11.1	-0.9	8.1	27.2	0.3	6.0
United States*										
Pickup trucks	2 292 934	2 020 739	2 145 389	2 417 230	2 792 063	2 656 949	2 810 868	2 769 562	2 959 749	3 193 458
Percent Share of Total	50.6	49.1	46.4	45.3	46.4	43.9	43.0	40.6	40.2	39.1
Percentage Change		-11.9	6.2	12.7	15.5	-4.8	5.8	-1.5	6.9	7.9
Sports Utility Vehicles	929 066	909 555	1 133 141	1 379 600	1 556 075	1 753 417	2 140 455	2 435 301	2 794 206	3 218 503
Percent Share of Total	20.5	22.1	24.5	25.8	25.8	29.0	32.8	35.7	37.9	39.4
Percentage Change		-2.1	24.6	21.8	12.8	12.7	22.1	13.8	14.7	15.2
Vans	1 309 010	1 181 349	1 341 062	1 541 122	1 674 719	1 642 269	1 582 590	1 609 681	1 615 181	1 759 510
Percent Share of Total	28.9	28.7	29.0	28.9	27.8	27.1	24.2	23.6	21.9	21.5
Percentage Change		-9.8	13.5	14.9	8.7	-1.9	-3.6	1.7	0.3	8.9
Total	4 531 010	4 111 643	4 619 592	5 337 952	6 022 857	6 052 635	6 533 913	6 814 544	7 369 136	8 171 471
Percentage Change		-9.3	12.4	15.6	12.8	0.5	8.0	4.3	8.1	10.9

* Commercial Chassis are not included in totals

Source: Ward's AutoInfoBank



	1985	1987	1988	1989	1990	1993	1994	1995	1996	1997	1998	1999*
Passenger Cars	11 118	11 773	12 086	12 811	12 622	12 925	13 131	13 192	13 251	13 487	13 887	16 538
Trucks and Truck Tractors	3 095	3 508	3 706	3 396	3 867	3 345	3 393	3 411	3 476	3 527	3 625	2 607
Buses	53	59	60	62	64	65	65	64	64	65	68	73
Motorcycles	453	414	370	348	331	309	306	297	290	299	314	274
Mopeds	35	34	31	30	28	26	24	22	21	20	20	N/A
Other Vehicles	64	76	84	72	69	61	63	60	60	80	73	N/A
Total	14 818	15 864	16 337	16 719	16 981	16 731	16 982	17 046	17 162	17 478	17 987	19 492

* Different grouping used for 1999; mopeds included in motorcycles

Source: Statistics Canada Catalogue Number 53-219-XPB.

Motor Vehicle Registrations in Major Markets
(Thousands of Units)

Table 1.7

	1970	1975	1980	1985	1990	1994	1995	1996	1997	1998
Australia	4 784	6 214	7 263	8 729	9 777	10 518	10 651	10 750	11 351	11 738
Belguim	2 351	2 936	3 513	3 634	4 277	4 619	4 696	4 780	4 862	5 001
Canada	8 083	11 028	13 719	14 818	16 553	17 440	17 046	17 231	17 478	17 987
France	14 370	17 810	21 705	25 070	28 460	30 040	30 295	30 755	31 470	32 310
Germany	15 605	19 499	24 853	27 822	32 685	42 545	43 319	43 971	44 552	44 979
Italy	11 111	16 253	19 115	24 405	29 910	32 455	33 164	33 736	34 398	34 596
Japan	17 582	28 091	37 856	46 157	57 678	65 011	66 854	68 801	70 003	70 815
Netherlands	2 777	2 741	4 889	5 330	6 091	6 211	6 290	6 420	6 670	6 640
Spain	3 119	5 860	8 962	10 884	14 443	16 687	17 284	17 954	18 657	19 612
Sweden	2 447	2 931	3 077	3 383	3 925	3 912	3 953	3 982	4 040	4 145
U.K.	13 571	15 995	17 358	22 231	26 302	26 926	27 431	28 021	28 816	30 406
Mexico	1 792	3 340	5 829	7 476	9 882	11 530	11 825	12 230	12 700	13 891
U.S.	108 418	132 949	188 796	171 354	188 656	195 469	200 446	206 365	207 754	209 750
Total	206 010	265 647	356 935	371 293	428 639	463 363	473 254	484 996	492 751	501 870

Source: Data was compiled from various sources such as governments and associations' Internet-based databases, other printed publications, National Institute of Statistics (INEGI), Kama.

Top 15 Best Selling Light Trucks in Canada - 1998 and 1999
(Units)

Table 1.9

Light Trucks					
1999		1998			
1	Dodge Caravan	73 930	1	Ford F-Series	69 477
2	Ford F-Series	73 748	2	Dodge Caravan	51 646
3	Ford Windstar	55 528	3	Ford Windstar	48 300
4	GMC-Sierra	36 829	4	Chevy CK Pickup	40 945
5	Chevy Silverado	34 234	5	GMC-Sierra	39 304
6	Dodge Ram Pickup	30 064	6	Plymouth Voyager	38 553
7	Ford Explorer	24 928	7	Dodge Ram Pickup	34 171
8	Chevrolet Venture	23 151	8	Ford Explorer	19 809
9	Jeep Grand Cherokee	19 003	9	Pontiac Trans Sport	19 135
10	Pontiac Trans Sport	17 838	10	Chevrolet Venture	17 719
11	Toyota Sienna	15 763	11	Jeep Grand Cherokee	15 763
12	Plymouth Voyager	15 711	12	Toyota Sienna	15 138
13	Ford Econoline	14 835	13	Honda CR-V	14 306
14	Honda CR-V	14 511	14	Dodge Dakota	14 286
15	Dodge Dakota	14 411	15	Ford Econoline	13 347

Source: Ward's AutoInfoBank, AIAMC

Light Vehicle Dealerships by Company In Canada

Table 1.10

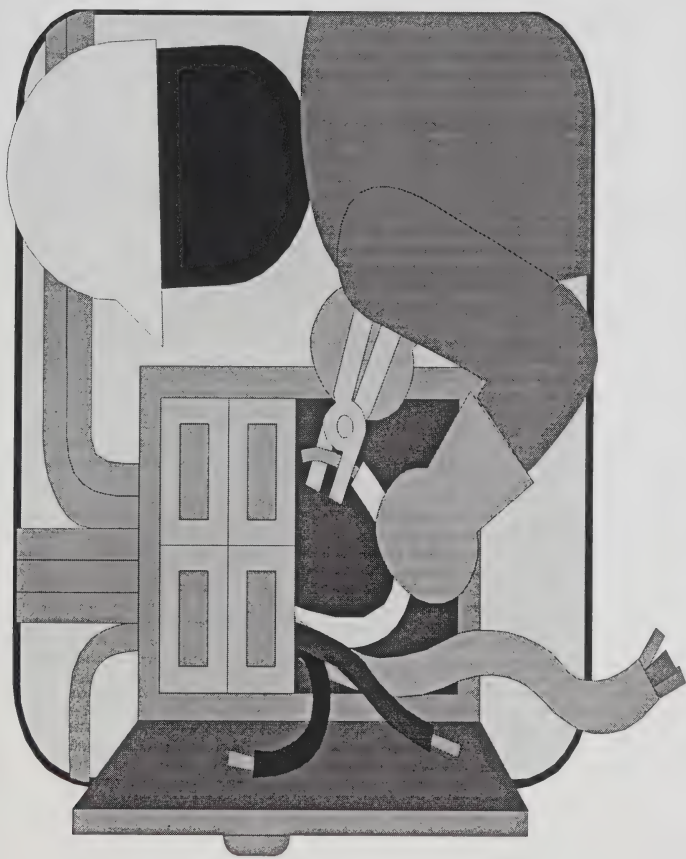
Company	1980	1985	1989	1990	1993	1994	1995	1996	1997	1998	1999
Acura	--	--	--	41	44	42	39	39	41	48	42
American Motors	256	189	--	--	--	--	--	--	--	--	--
BMW	39	43	42	38	35	36	33	33	30	31	31
Daimler Chrysler	566	555	695	659	601	607	609	598	586	570	570
Daewoo	--	--	--	--	--	--	--	--	--	11	11
Fiat	53	88	--	--	--	--	--	--	--	--	--
Ford	781	715	669	655	643	640	623	604	597	577	577
General Motors	1 091	969	964	947	906	868	847	824	868	848	848
Honda	160	188	256	218	217	213	205	203	203	206	205
Hyundai	--	173	157	144	156	146	139	139	142	143	143
Infiniti *	--	--	--	--	23	22	22	23	--	--	--
Jaguar	97	20	23	23	21	21	20	18	18	19	19
Kia	--	--	--	--	78	--	--	--	--	--	28
Lada	44	76	61	69	--	77	89	75	22	21	21
Land Rover	--	--	--	--	--	--	--	--	--	13	13
Lexus **	--	--	--	--	22	22	22	22	--	--	--
Mazda	130	137	168	176	184	181	176	167	159	151	151
Mercedes-Benz	57	53	54	56	39	57	58	56	53	49	49
Nissan	212	188	180	179	161	156	148	146	169	165	165
Passport/Saturn ***	--	--	59	70	66	65	62	--	--	--	--
Porsche	--	--	--	--	--	--	--	--	--	11	11
Saab***	52	41	32	--	--	--	--	--	--	--	--
Skocar	--	60	23	34	--	--	--	--	--	--	--
Subaru	102	80	89	87	87	93	95	97	100	97	97
Suzuki	--	86	103	107	103	106	108	91	86	89	89
Toyota	195	208	237	239	234	232	229	228	251	251	251
Volkswagen/Audi	202	200	189	184	180	174	162	160	155	190	190
Volvo	94	72	61	61	53	51	48	46	46	45	45
Total Light Vehicle Dealers	4 131	4 141	4 062	3 987	3 853	3 809	3 734	3 569	3 526	3 535	3 556

* Figures are included with Nissan in 1997

** Figures are included with Toyota in 1997

*** Figures are included with General Motors starting in 1996.

Source: Canadian Automobile Dealers Association (CADA)



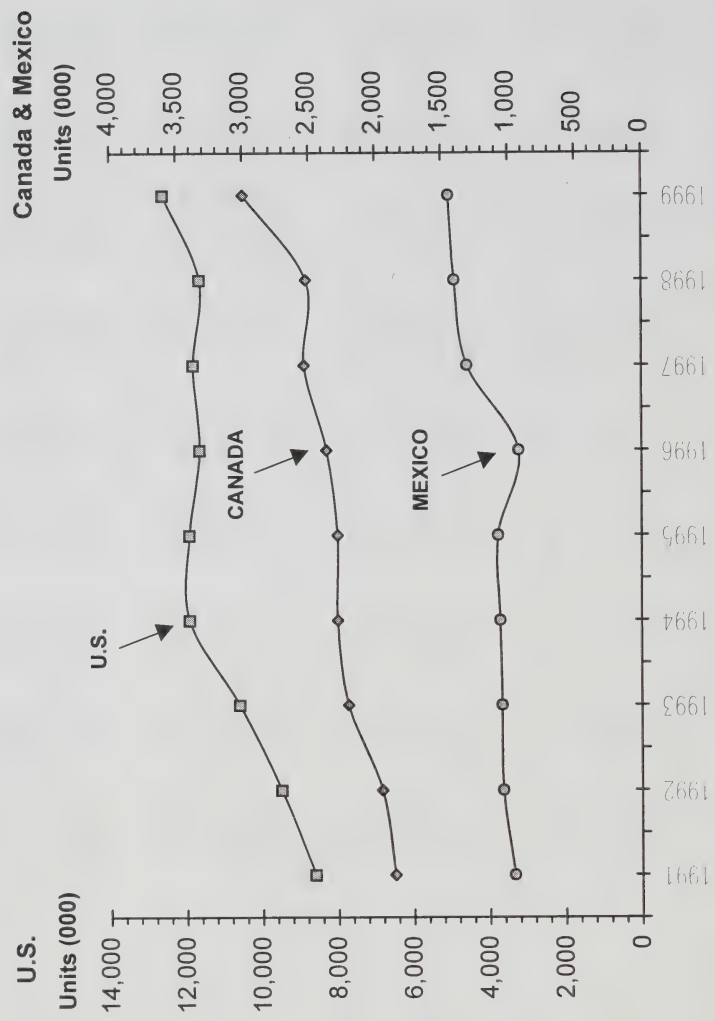
PRODUCTION

North American Production of Motor Vehicles
(Thousands of Units)

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Canada											
Passenger Cars	1 017	1 098	1 060	1 028	1 353	1 216	1 337	1 280	1 373	1 481	1 626
Light Trucks	900	807	796	907	852	1 069	1 030	1 088	1 161	1 040	1 370
Light Vehicles	1 917	1 905	1 856	1 935	2 205	2 285	2 367	2 368	2 534	2 521	2 996
Heavy-Duty Trucks	47	43	31	38	49	36	41	29	37	49	61
Total Vehicles	1 964	1 948	1 887	1 973	2 254	2 321	2 408	2 397	2 571	2 570	3 057
U.S.											
Passenger Cars	6 821	6 078	5 440	5 667	5 982	6 601	6 340	6 083	5 934	5 554	5 638
Light Trucks	3 781	3 464	3 160	3 825	4 608	5 305	5 285	5 449	5 859	6 074	6 955
Light Vehicles	10 602	9 542	8 600	9 492	10 590	11 906	11 625	11 532	11 793	11 628	12 593
Heavy-Duty Trucks	254	226	173	217	265	333	370	299	338	374	432
Total Vehicles	10 856	9 768	8 773	9 709	10 855	12 239	11 995	11 831	12 131	12 002	13 025
Mexico											
Passenger Cars	439	598	720	776	835	857	705	798	855	956	994
Light Trucks	190	203	235	264	213	220	217	386	454	445	451
Light Vehicles	629	801	955	1 040	1 048	1 077	922	1 184	1 309	1 401	1 445
Heavy-Duty Trucks	12	17	31	38	29	45	18	34	45	59	89
Total Vehicles	641	818	986	1 078	1 077	1 122	940	1 218	1 354	1 460	1 534
North America Total											
Passenger Cars	8 277	7 774	7 220	7 471	8 170	8 674	8 382	8 161	8 162	7 991	8 258
Light Trucks	4 871	4 474	4 191	4 996	5 673	6 594	6 532	6 923	7 474	7 559	8 776
Light Vehicles	13 148	12 248	11 411	12 467	13 843	15 268	14 914	15 084	15 636	15 550	17 034
Heavy-Duty Trucks	313	286	235	293	343	414	429	362	420	482	582
Total Vehicles	13 461	12 534	11 646	12 760	14 186	15 682	15 343	15 446	16 056	16 032	17 616

*Includes motor homes and chassis

Source: Ward's AutoInfoBank



Company

Ranked by 1999 North American Production*

	1996 Ranking	1997 Ranking	1998 Ranking	1999 Ranking
General Motors	4 943	1	5 415	1
Ford	4 233	2	4 308	2
DaimlerChrysler	2 461	3	2 672	3
Honda	780	4	816	4
Toyota	483	6	467	6
Nissan	550	5	571	5
Volkswagen	238	8	258	8
NUMMI	356	7	422	7
Subaru-Isuzu	195	9	187	10
Auto Alliance (formerly Mazda)	129	11	110	11
Diamond Star	192	10	189	9
CAMI	124	12	100	12

Ranked by 1999 World Production

General Motors	8 400	1	8 198	1	7 560	1	8 236	1
Ford	6 750	2	7 047	2	6 823	2	6 665	2
Toyota	4 756	3	4 890	3	5 290	3	5 496	3
DaimlerChrysler	2 861	5	2 819	7	4 423	5	4 822	4
Renault**	1 804	10	1 940	11	2 283	9	4 802	5
Volkswagen	3 977	4	4 291	4	4 823	4	4 786	6
Fiat-Iveco	2 586	7	2 886	5	2 660	6	2 624	7
Peugeot-Citroen	1 147	13	2 052	10	2 270	10	2 515	8
Honda	2 084	8	2 316	8	2 330	8	2 425	9
Hyundai	1 282	12	1 123	17	899	15	1 970	10
Mitsubishi	1 943	9	2 033	9	1 664	12	1 555	11
Suzuki	1 789	11	1 875	12	1 672	11	1 521	12

* Includes Mexico

** Nissan is part of Renault in World Production from 1999

Source: Ward's Automotive Reports, Automotive News.

Motor Vehicle Production by Major Producing Country
(Thousands of Units)

Table 2.3

	1970	1975	1980	1985	1990	1995	1996	1997	1998	1999
U.S.	8 263	8 965	8 010	11 648	9 768	11 972	11 832	12 149	12 042	13 025
Japan	5 289	6 941	11 043	12 271	13 487	10 195	10 346	11 177	10 976	9 905
Germany	3 842	3 186	3 879	4 446	4 661	4 515	4 351	4 537	5 721	5 688
Canada	1 193	1 442	1 374	1 930	1 922	2 401	2 397	2 578	2 568	3 057
France	2 750	2 861	3 378	3 016	3 295	2 740	2 728	3 047	2 910	3 033
Spain	536	814	1 182	1 418	1 679	2 308	2 412	2 531	2 752	2 852
South Korea	29	36	123	378	1 322	2 679	2 813	2 867	1 994	2 832
U.K.	2 098	1 648	1 313	1 311	1 296	1 738	1 929	1 941	1 987	1 973
Italy	1 854	1 459	1 612	1 573	1 875	1 623	1 547	1 811	1 657	1 701
Mexico	NA	NA	NA	398	804	944	1 222	1 336	1 428	1 534
Brazil	416	930	1 165	967	914	1 650	1 813	2 067	1 573	1 344
Russia	916	1 964	2 199	2 200	2 000	1 276	1 077	1 264	1 075	1 173

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Number of Units Produced (Thousands)	1 780	1 964	1 948	1 888	1 973	2 254	2 321	2 408	2 397	2 571	2 570	3 057
Value of SIC 3231 Shipments* (Millions of Dollars)	28 114	27 519	27 239	26 017	29 564	37 803	44 558	49 474	47 902	52 715	55 509	70 304
Unit Value (Dollars)	15 794	14 012	13 983	13 780	14 984	16 772	19 198	20 546	19 984	20 504	21 599	22 998

* Preliminary data based on Statistics Canada Catalogue Number 31-001-XPB.

Source: Statistics Canada and Ward's Automotive Yearbook.

Table 2.5

Industrial Product Price Indices* by Industry (1992=100)

	1992	1993	1994	1995	1996	1997	1998	1999
Motor Vehicle Industry (SIC 323)	100	107.5	114.7	118.7	122.8	127.3	139.0	141.2
Trailer and Bus Body and Trailer Industry (SIC 324)	100	101.8	99.8	105.8	110.0	114.6	117.0	118.3
Motor Vehicle Parts and Accessories Industry (SIC 325)	100	100.5	103.8	107.1	108.7	108.6	111.8	111.7

* The Industrial Product Price Indices (IPPI) measure price changes for major commodities sold by Canadian manufacturers.

Table 2.6
Value of Shipments in Canadian Automotive Industries
(Millions of Dollars)

	1970	1975	1980	1985	1990	1994	1995	1996	1997	1998	1999
Motor Vehicle Manufacturers	2 963	6 024	10 071	23 723	27 239	44 558	49 474	47 902	52 715	55 509	70 304
Truck Body and Trailer Manufacturers	244	774	978	1 148	1 411	1 567	1 923	2 004	2 333	2 671	2 862
Motor Vehicle Parts and Accessories Manufacturers	1 408*	2 552*	4 034	12 923	13 902	19 996	22 333	23 840	27 434	29 366	33 327
Automotive Tire and Tube Manufacturers**	N/A	N/A	N/A	1 653	1 350	1 550	1 744	1 754	1 773	1 940	15 156
Total	3 207	6 798	15 083	39 447	43 902	67 671	75 474	75 500	84 255	89 486	121 649

* Includes automobile fabric and accessories manufacturers

** Information supplied by companies

Source: Statistics Canada Catalogue Numbers 31-001-XPB, 31-203-XPB and 42-251-XPB.

Canadian Light Vehicle Production by Company
(Units)

Table 2.7

	1992	1993	1994	1995	1996	1997	1998	1999	1999 % Market Share
CAMI (GM/Suzuki)	133 521	159 399	170 231	183 510	124 100	99 770	45 063	112 314	3.75
DaimlerChrysler	464 523	643 371	695 630	538 097	705 446	627 157	738 321	796 727	26.59
Ford	474 845	454 165	494 829	533 443	537 082	630 829	627 384	685 535	22.88
GM	668 203	747 471	723 903	907 833	752 371	894 974	750 907	915 507	30.56
Honda	104 123	100 621	108 308	106 133	144 482	165 181	179 797	274 908	9.18
Hyundai	15 186	14 585	0	0	0	0	0	0	0.00
Toyota	68 092	79 219	85 871	90 136	97 344	108 952	171 739	211 082	7.05
Volvo	6 288	5 504	6 436	7 588	7 127	6 548	8 373	0	0.00
Total Production	1 934 781	2 204 335	2 285 208	2 366 740	2 367 952	2 533 411	2 521 584	2 996 073	100.00

	1992	1993	1994	1995	1996	1997	1998	1999	1999 % Market Share
Auto Alliance (Ford/Mazda)	168 859	219 096	247 004	149 562	129 441	100 394	167 268	165 143	1.31
BMW	0	0	385	11 877	50 278	62 943	54 802	48 394	0.38
DaimlerChrysler	1 283 369	1 427 555	1 693 535	1 718 583	1 694 121	1 705 657	1 809 342	1 960 110	15.57
Diamond Star/Mitsubishi	139 783	136 022	169 829	218 161	192 961	189 086	157 139	159 702	1.27
Ford	2 784 448	3 294 217	3 655 762	3 371 424	3 474 706	3 458 342	3 449 023	3 638 879	28.90
GM	3 718 894	4 040 453	4 403 909	4 222 624	3 994 720	4 233 144	3 863 421	4 436 252	35.23
Honda	458 251	403 775	498 710	552 995	634 374	648 268	694 703	686 043	5.45
Mercedes Benz	0	0	0	84	766	20 205	69 526	78 507	0.62
Nissan	300 326	386 973	444 608	465 786	414 031	398 308	308 837	324 645	2.58
NUMMI (GM/Toyota)	256 231	321 428	363 040	352 675	365 469	357 809	361 859	367 121	2.92
Subaru-Isuzu	124 020	126 558	153 883	180 174	194 871	186 891	216 198	192 200	1.53
Toyota	240 382	234 060	275 678	381 445	385 657	431 811	476 203	533 702	4.24
Total Production	9 474 563	10 590 137	11 906 343	11 625 390	11 531 395	11 792 858	11 628 321	12 590 698	100.00

Source: Ward's AutoInfoBank

Table 2.9

Mexico Light Vehicle Production by Company
(Units)

	1992	1993	1994	1995	1996	1997	1998	1999	1999 Market Share
BMW	0	0	0	245	487	970	1 932	1 596	0.11
DaimlerChrysler	229 145	222 609	238 888	205 192	360 333	352 847	361 802	332 786	23.02
Ford	251 811	208 530	226 329	213 531	188 228	221 523	186 002	177 205	12.26
GM	198 132	192 279	161 094	198 407	266 012	299 485	314 516	327 526	22.66
Honda	0	0	0	135	1 194	3 045	7 194	10 241	0.71
Mercedes Benz	0	0	590	814	1 043	955	722	190	0.01
Nissan	172 562	185 922	193 591	106 794	135 637	172 763	189 787	185 574	12.84
Porsche	0	0	0	0	32	20	13	9	0.00
Volkswagen	188 488	239 003	256 317	191 438	231 078	257 366	338 959	410 308	28.39
Total Production	1 040 138	1 048 343	1 076 809	916 556	1 184 044	1 308 974	1 400 927	1 445 435	100.00

**Total North American Light Vehicle Production by Company
(Units)**

Table 2.10

	1992	1993	1994	1995	1996	1997	1998	1999	% Market Share	1999
Auto Alliance (Ford/Mazda)	168 859	219 096	247 004	149 562	129 441	100 394	167 268	165 143		0.97
BMW	0	0	385	12 122	50 765	63 913	56 734	49 990		0.29
CAMI (GM/Suzuki)	133 521	159 399	170 231	183 510	124 100	99 770	45 063	112 314		0.66
DaimlerChrysler	1 977 037	2 293 535	2 628 053	2 467 765	2 759 900	2 685 661	2 909 465	3 089 629		18.14
Diamond Star/Mitsubishi	139 783	136 022	169 829	218 161	192 961	189 086	157 139	159 702		0.94
Ford	3 511 104	3 956 912	4 376 920	4 118 398	4 200 016	4 310 694	4 262 409	4 501 619		26.43
GM	4 585 229	4 980 203	5 288 906	5 328 864	5 013 103	5 427 603	4 928 844	5 679 285		33.34
Honda	562 374	504 396	607 018	659 263	780 050	816 494	881 694	971 192		5.70
Hyundai	15 186	14 585	0	0	0	0	0	0		0.00
Mercedes Benz	0	0	590	898	1 809	21 160	70 248	78 697		0.46
Nissan	472 888	572 895	638 199	572 580	549 668	571 071	498 624	510 219		3.00
NUMMI (GM/Toyota)	256 231	321 428	363 040	352 675	365 469	357 809	361 859	367 121		2.16
Porsche	0	0	0	0	29	20	13	9		0.00
Subaru-Isuzu	124 020	126 558	153 883	180 174	194 871	186 891	216 198	192 200		1.13
Toyota	308 474	313 279	361 549	471 581	483 001	540 763	647 942	744 784		4.37
VW	188 488	239 003	256 317	191 438	231 078	257 366	338 959	410 308		2.41
Volvo	6 288	5 504	6 436	7 588	7 127	6 548	8 373	0		0.00
Total Production	12 449 482	13 842 815	15 268 360	14 914 579	15 083 388	15 635 243	15 550 832	17 032 212		100.00

Source: Ward's AutoInfoBank and Automotive Reports

Table 2.11

Cost of Materials* in the Canadian Automotive Industry
(Millions of Dollars)

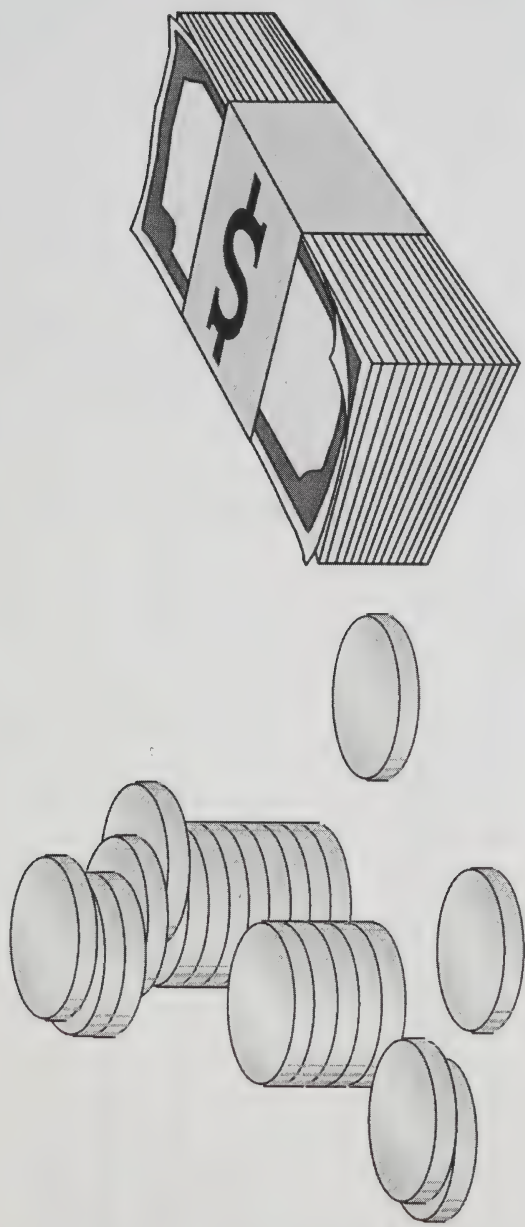
	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
Motor Vehicles	19 600	34 309	40 279	39 326	36 847	21 801	24 601	31 512	36 609	40 680	37 972	41 458
Truck and bus body	248	290	367	401	287	279	210	219	264	295	271	372
Commercial trailers	308	430	442	368	310	166	1 459	185	274	446	424	545
Non-commercial trailers	220	266	329	300	240	125	156	177	223	288	258	286
Mobile homes	58	59	79	99	112	98	102	116	139	135	150	149
Total	834	1 045	1 217	1 168	949	668	1 927	697	900	1 164	1 103	1 352
Engines and parts	1 645	2 028	2 143	2 357	1 720	881	1 129	1 495	1 898	1 706	2 238	2 398
Wiring assemblies	187	185	172	253	239	200	230	439	591	701	597	596
Stampings	1 060	1 133	1 321	1 421	1 305	1 298	1 430	1 572	1 854	2 131	2 119	2 305
Steering and suspension	288	307	429	480	155	345	428	564	784	849	832	914
Wheel and brake	419	472	540	597	535	416	476	532	634	715	721	827
Plastic parts	551	669	720	838	598	527	571	693	895	1 009	1 001	1 245
Fabrics	488	524	609	648	740	699	862	995	1 274	1 324	1 379	1 684
Other motor vehicle parts	1 589	1 669	2 086	2 381	2 430	2 635	2 869	3 082	3 608	4 296	4 376	5 545
Total parts	6 227	6 987	8 020	8 975	7 722	7 001	7 995	9 372	11 538	12 731	13 263	15 514
Total industry	26 661	42 341	49 516	49 469	45 518	29 470	34 523	41 581	49 047	54 575	52 338	58 324

* Represents cost of items used in the manufacturing process.

(Millions of Dollars)

	1990	1991	1992	1993	1994	1995	1996	1997	1998
Automobile and Light Duty Motor Vehicles	4 272	3 624	4 595	5 252	6 964	7 538	8 997	10 001	11 275
Heavy Duty Vehicles									
Heavy duty trucks	384	416	364	765	1 005	1 184	789	871	1 187
Motor vehicle body	276	216	220	263	272	345	440	492	520
Truck trailer	189	143	107	129	225	278	281	295	381
Total	849	775	691	1 157	1 502	1 807	1 510	1 658	2 088
Auto Parts and Components									
Engines and parts	1 197	667	603	1 042	1 103	1 465	2 036	2 303	2 943
Seating and interior trim	656	687	696	712	987	1 066	1 182	1 315	1 388
Metal stampings	704	758	873	1 216	1 375	1 562	1 533	1 657	1 520
Transmission and power train parts	556	824	855	827	688	860	891	1 285	1 394
Brake system	385	350	424	509	589	642	625	703	831
Steering and suspension components	322	249	304	378	434	501	536	606	685
Electrical and electronic equipment	334	274	281	357	488	417	510	592	681
Other motor vehicle parts	1 222	1 132	1 290	1 331	1 477	1 683	1 638	1 766	1 910
Total	5 376	4 941	5 326	6 372	7 141	8 196	8 951	10 227	11 352
Total Industry	10 497	9 340	10 612	12 781	15 607	17 541	19 458	21 886	24 715

Source: Statistics Canada Catalogue Number 31-203;
Methodology and groupings underwent minor modifications in 1997.



Investment/Research and Development/Exchange Rates/Prices/GDP

	1970	1975	1980	1985	1990	1994	1995	1996	1997	1998	1999*
Motor Vehicle Manufacturers (SIC 323)	32	61	136	714	787	1 342	1 608	2 915	3 184	2 465	2 346
Truck Body Manufacturers (SIC 324)**	13	19	47	9	8	66	75	79	87	35	35
Motor Vehicle Parts and Accessories Manufacturers (SIC 325)	170	81	781	332	457	1 774	1 671	818	1 104	1 330	840
Automotive Dealers (SIC 631)***	N/A	N/A	192	292	316	1 017	1 261	1 005	924	1 012	1 038
Total	215	161	1 156	1 347	1 568	4 199	4 615	4 817	5 299	4 807	4 224

* Intentions

** Decrease from 1993 to 1994 is due to a change in the survey sample.

*** Data for 1991 onward also includes recreational vehicle dealers, gasoline service stations, repair shops and parts and accessories dealers. Revised data for previous years is not available.

Note: Decrease in 1996 for SIC 325 is due to capital investment that was planned and took place only in 1997.

Source: Statistics Canada catalogue Number 61-205-XPB.

Research and Development in the Motor Vehicle Industries
(SIC 323, 324 and 325)

Table 3.2

	1970	1981	1985	1990	1991	1992	1993	1994	1995	1996	1997*	1998
Number of R&D Performers	28	33	39	46	39	50	53	153	143	131	98	103
Total R&D Personnel (Person Years)	NA	890	1 050	895	860	865	975	1 534	1 478	1 463	1 338	1 480
Total R&D Expenditures (Millions of Dollars)	12	50	78	69	77	83	125	212	185	170	175	189
<i>R&D Expenditures as Percentage of Shipments</i>	0.21	0.28	0.19	0.16	0.19	0.18	0.22	0.29	0.21	0.19	0.20	0.21

* Preliminary figures

R&D data for 1991 has been revised due to reclassification of the largest category of R&D performer. Starting in 1996, data may be incomplete due to new methodology adopted by Statistics Canada.

Exchange Rates
(Canadian dollars)

	1970	1975	1980	1985	1990	1995	1996	1997	1998	1999
U.S. Dollar	1.077	1.017	1.169	1.366	1.167	1.372	1.364	1.385	1.484	1.486
British Pound	2.502	2.259	2.720	1.771	2.082	2.166	2.130	2.268	2.459	2.404
French Franc	0.189	0.238	0.277	0.153	0.215	0.275	0.267	0.237	0.252	0.242
German Mark	0.286	0.414	0.644	0.468	0.724	0.959	0.907	0.799	0.845	0.811
Japanese Yen (000)	2.920	3.430	5.190	5.770	8.100	14.680	12.540	11.450	11.400	13.110

Source: Statistics Canada, Canadian Economic Observer, Catalogue Numbers 11-210-XPB and 11-010-XPB

**Average Prices of Passenger Cars
(\$ Canadian)**

Table 3.4

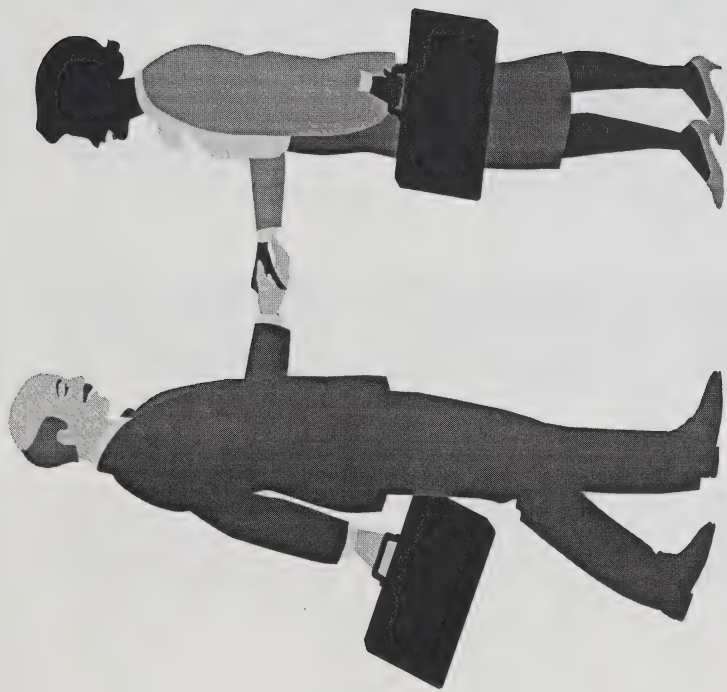
	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
North American	14 312	15 290	16 339	16 876	15 766	16 785	17 459	18 478	20 009	21 066	21 937	21 066	22 612
Japan	14 665	15 522	16 228	16 761	15 940	17 128	18 139	18 110	20 875	23 345	22 921	21 474	21 808
Other Countries	17 759	21 013	22 114	22 390	20 519	20 513	22 389	27 136	29 036	33 025	35 259	35 518	33 680
Total all Countries	15 579	17 275	18 227	18 676	17 408	18 142	19 329	21 241	23 307	25 812	26 706	26 019	26 033

**Gross Domestic Product (1992 Factor Cost)
(\$ Millions)**

Table 3.5

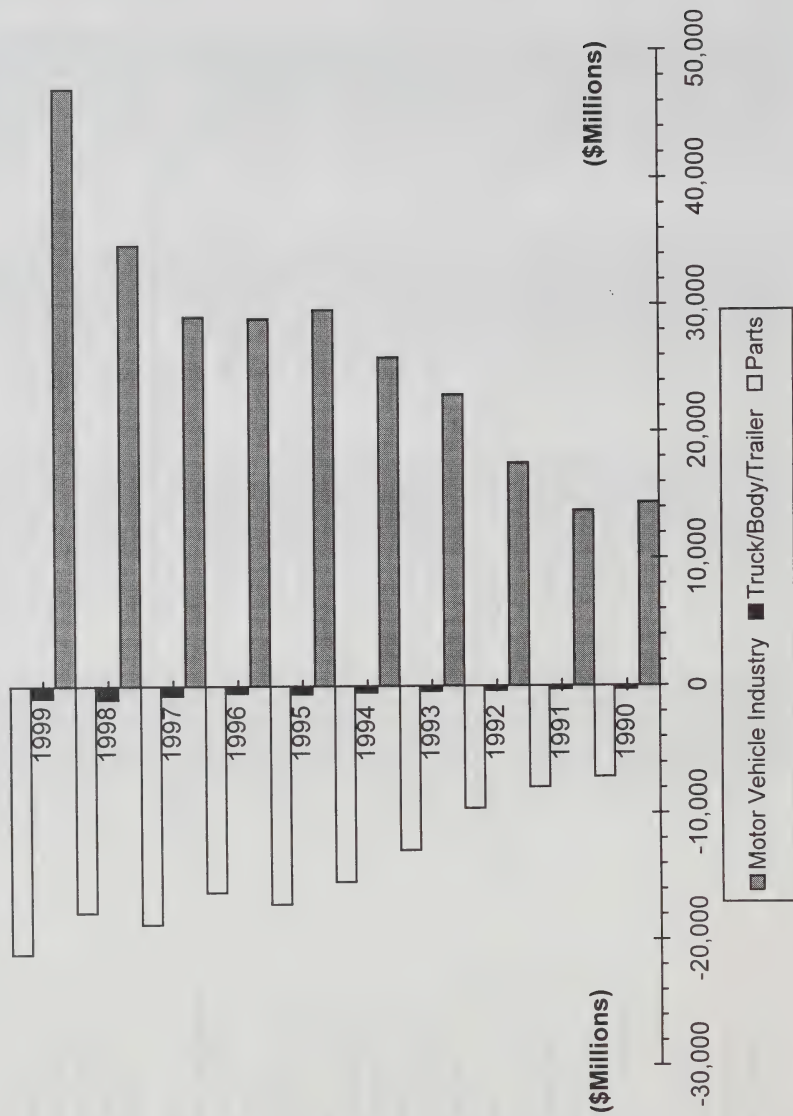
	1993	1994	1995	1996	1997	1998	1999
Total Industry	618 422	645 957	663 082	672 799	700 039	721 879	753 047
Manufacturing Industries	101 101	108 859	114 239	115 659	122 320	127 335	135 419
Motor Vehicle Industry	5 403	5 855	6 103	5 644	6 005	6 246	7 744
Truck and bus body and trailer industries	470	585	682	723	836	929	992
Motor vehicle engine and engine parts	568	633	630	877	1 033	1 144	1 323
Motor vehicle wiring assemblies	332	473	423	425	410	393	360
Motor vehicle stampings	951	1 200	1 427	1 486	1 637	1 802	2 140
Motor vehicle steering and suspension parts	422	547	610	655	714	825	822
Motor vehicle wheel and brakes	403	473	485	444	513	557	605
Plastic parts and accessories	611	748	884	944	1 106	1 093	1 270
Motor vehicle fabric accessories	519	640	722	767	831	846	945
Other motor vehicle parts and accessories	2 063	2 328	2 542	2 596	3 222	3 232	3 807
Motor vehicle parts and accessories industries	5 931	6 498	7 412	7 564	8 198	9 892	11 272
Total Automotive Industry	11 804	12 938	14 197	13 931	15 039	17 067	20 008
Percent of Manufacturing GDP	11.68	11.89	12.43	12.04	12.29	13.40	14.77
Percent of Total Industry GDP	1.91	2.00	2.14	2.07	2.15	2.36	2.66

Source: Statistics Canada, Catalogue Number 15-001-XPB



Trade Data

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Canadian Exports										
Motor Vehicle Industry	23 943	23 609	27 306	34 681	42 260	45 838	45 208	49 141	54 600	68 658
Truck/Body/Trailer	136	178	220	309	321	357	389	485	627	789
Engine Parts Industry	3 034	2 376	2 696	3 382	3 763	3 638	4 591	4 950	5 984	7 314
Wiring Assemblies	230	174	212	193	246	222	237	252	308	314
Stampings	903	829	1 020	1 332	1 671	1 710	1 905	2 238	2 286	2 622
Steering and Suspension	660	591	696	835	1 002	1 029	984	962	972	1 121
Wheel and Brake	979	915	1 133	1 370	1 531	1 633	1 609	1 740	2 072	2 089
Plastic Parts	240	269	359	515	712	801	959	1 157	1 217	1 399
Motor Vehicle Fabric	289	232	305	382	868	778	847	949	1 133	1 109
Other Motor Vehicle Parts	3 534	3 033	3 493	3 938	4 188	4 508	4 389	4 932	5 513	6 796
Total Exports	33 948	32 206	37 440	46 937	56 562	60 514	61 098	66 806	74 712	92 211
Canadian Imports										
Motor Vehicle Industry	13 364	14 523	14 245	15 318	19 689	19 091	19 546	25 047	25 153	27 945
Truck/Body/Trailer	428	461	627	737	855	1 000	955	1 239	1 693	1 734
Engine Parts Industry	4 097	3 950	4 725	6 121	7 408	7 823	8 131	9 109	8 651	10 734
Wiring Assemblies	1 122	1 139	1 227	1 627	2 050	2 064	2 141	2 400	2 918	3 344
Stampings	3 851	3 508	3 912	4 657	5 530	5 509	5 525	6 064	4 478	5 424
Steering and Suspension	1 217	1 219	1 464	1 927	2 195	2 289	2 220	2 628	2 984	3 460
Wheel and Brake	962	1 018	1 279	1 782	2 196	2 306	2 273	2 648	2 897	3 081
Plastic Parts	36	35	42	46	50	47	48	51	57	61
Motor Vehicle Fabric	172	182	323	461	398	985	939	1 066	1 307	1 813
Other Motor Vehicle Parts	5 541	5 300	6 528	8 218	9 561	10 479	10 474	11 978	14 025	15 953
Total Imports	30 790	31 335	34 372	40 894	49 932	51 593	52 252	62 230	64 163	73 549
Trade Balances										
Motor Vehicle Industry	10 579	9 086	13 061	19 363	22 571	26 747	25 662	24 094	29 447	40 713
Truck/Body/Trailer	(292)	(283)	(407)	(428)	(534)	(643)	(566)	(754)	(1 066)	(945)
Engine Parts Industry	(1 063)	(1 574)	(2 029)	(2 739)	(3 645)	(4 185)	(3 540)	(4 159)	(2 667)	(3 420)
Wiring Assemblies	(892)	(965)	(1 015)	(1 434)	(1 804)	(1 842)	(1 904)	(2 148)	(2 610)	(3 030)
Stampings	(2 948)	(2 679)	(2 892)	(3 325)	(3 859)	(3 799)	(3 620)	(3 826)	(2 192)	(2 802)
Steering and Suspension	(557)	(628)	(768)	(1 092)	(1 193)	(1 260)	(1 256)	(1 666)	(2 012)	(2 339)
Wheel and Brake	17	(103)	(146)	(412)	(665)	(673)	(664)	(908)	(825)	(992)
Plastic Parts	204	234	317	469	662	754	911	1 106	1 160	1 338
Motor Vehicle Fabric	117	50	(18)	(79)	470	(207)	(92)	(117)	(174)	(704)
Other Motor Vehicle Parts	(2 007)	(2 267)	(3 035)	(4 280)	(5 373)	(5 971)	(6 085)	(7 046)	(8 512)	(9 157)
Total Exports and Imports	3 158	871	3 068	6 043	6 630	8 921	8 846	4 576	10 549	18 662



	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Canadian Exports										
Motor Vehicle Industry	23 737	23 367	27 020	34 163	41 617	44 839	44 580	48 595	54 138	68 013
Truck/Body/Trailer	130	167	216	300	307	340	374	470	611	776
Engine Parts Industry	2 930	2 273	2 585	3 242	3 623	3 429	4 398	4 780	5 838	7 156
Wiring Assemblies	218	163	199	177	220	203	214	235	287	296
Stampings	800	706	867	1 125	1 439	1 440	1 719	1 917	2 064	2 443
Steering and Suspension	641	568	672	792	955	962	902	907	935	1 086
Wheel and Brake	904	822	1 028	1 277	1 425	1 516	1 484	1 593	1 946	1 983
Plastic Parts	174	193	265	392	571	649	867	950	1 074	1 289
Motor Vehicle Fabric	247	179	244	298	766	672	785	810	1 028	990
Other Motor Vehicle Parts	3 369	2 825	3 279	3 655	3 901	3 995	3 968	4 459	5 240	6 419
Total Exports	33 150	31 263	36 375	45 421	54 824	58 045	59 291	64 716	73 161	90 451
Canadian Imports										
Motor Vehicle Industry	9 366	9 629	9 506	11 251	15 748	15 205	15 625	19 490	19 389	20 930
Truck/Body/Trailer	408	447	599	709	822	976	934	1 221	1 636	1 681
Engine Parts Industry	3 191	3 116	3 880	5 053	5 975	6 458	6 707	7 825	7 803	9 447
Wiring Assemblies	925	900	966	1 348	1 600	1 488	1 401	1 476	1 739	2 075
Stampings	3 345	2 890	3 316	4 077	4 922	5 057	5 151	5 700	4 089	4 942
Steering and Suspension	1 105	1 076	1 300	1 709	1 936	2 038	2 002	2 402	2 727	3 162
Wheel and Brake	775	768	1 030	1 543	1 920	2 023	1 979	2 310	2 529	2 676
Plastic Parts	27	24	32	34	35	29	29	35	48	56
Motor Vehicle Fabric	119	131	150	169	186	626	591	641	797	1 179
Other Motor Vehicle Parts	4 731	4 422	5 666	7 150	8 238	9 304	9 477	10 988	12 645	14 455
Total Imports	23 992	23 403	26 445	33 043	41 382	43 204	43 896	52 088	53 402	60 603
Trade Balances										
Motor Vehicle Industry	14 371	13 738	17 514	22 912	25 869	29 634	28 955	29 105	34 749	47 083
Truck/Body/Trailer	(278)	(280)	(383)	(409)	(515)	(636)	(560)	(751)	(1 025)	(905)
Engine Parts Industry	(261)	(843)	(1 295)	(1 811)	(2 352)	(3 029)	(2 309)	(3 045)	(1 965)	(2 291)
Wiring Assemblies	(707)	(747)	(767)	(1 171)	(1 380)	(1 285)	(1 187)	(1 241)	(1 452)	(1 779)
Stampings	(2 545)	(2 184)	(2 449)	(2 952)	(3 483)	(3 617)	(3 432)	(3 783)	(2 025)	(2 499)
Steering and Suspension	(464)	(508)	(628)	(917)	(981)	(1 076)	(1 100)	(1 495)	(1 792)	(2 076)
Wheel and Brake	129	(54)	(2)	(266)	(495)	(507)	(495)	(717)	(583)	(693)
Plastic Parts	147	169	233	358	536	620	838	915	1 026	1 233
Motor Vehicle Fabric	128	48	(94)	(129)	580	(46)	(194)	(169)	(231)	(189)
Other Motor Vehicle Parts	(1 362)	(1 597)	(2 387)	(3 495)	(4 337)	(5 309)	(5 509)	(6 529)	(7 405)	(8 036)
Total Exports and Imports	9 158	7 860	9 930	12 378	13 442	14 841	15 395	12 628	19 759	29 848

(Thousands of Dollars)

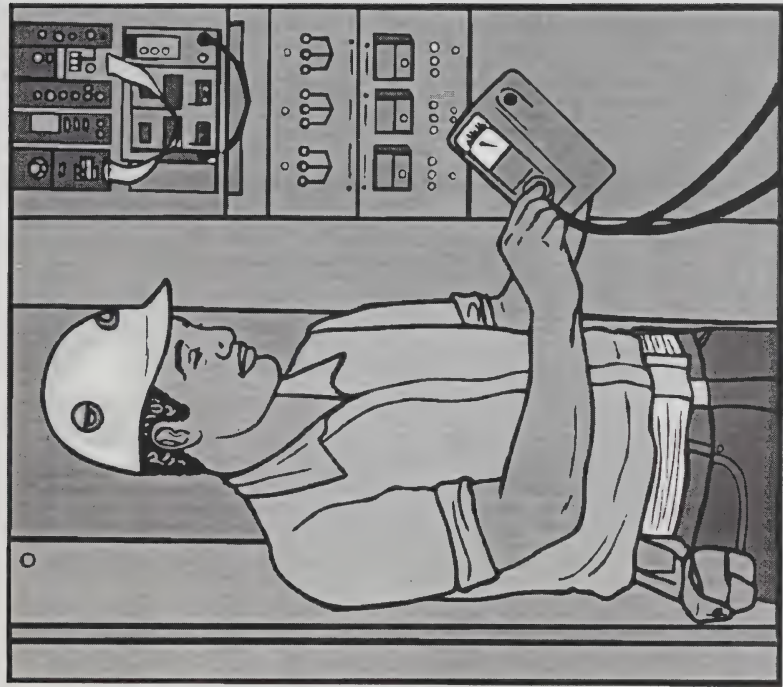
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Canadian Exports										
Motor Vehicle Industry	27	28 408	32	4 970	61 265	43 583	64 265	36 726	20 138	81 627
Truck/Body/Trailer	9	643	0	362	6	0	0	3	126	38
Engine Parts Industry	24 345	13 138	20 033	25 967	24 946	68 718	66 694	73 038	62 978	67 651
Wiring Assemblies	539	184	343	849	475	388	126	74	354	323
Stampings	15 466	16 101	25 551	24 361	18 581	25 852	29 308	19 607	20 188	21 634
Steering and Suspension	3 654	4 161	5 484	4 839	4 999	8 870	7 141	8 635	8 976	10 703
Wheel and Brake	2 631	5 105	1 881	2 636	8 333	14 072	25 888	47 964	45 216	57 797
Plastic Parts	7 981	7 537	10 825	10 788	8 688	8 661	7 824	4 653	6 528	6 092
Motor Vehicle Fabric	5163	8 172	6 378	10 035	9 447	8 772	5 761	4 093	12 769	49 586
Other Motor Vehicle Parts	53 147	69 672	88 981	61 900	27 522	81 036	84 236	103 730	96 353	144 328
Total Exports	112 962	153 121	159 508	146 707	164 262	259 952	291 243	298 523	273 626	439 779
Canadian Imports										
Motor Vehicle Industry	133 239	717 651	601 970	962 186	1 159 751	1 568 571	1 669 480	1 744 411	1 412 850	1 696 106
Truck/Body/Trailer	311	20	50	615	4 374	4 729	2 339	2 865	30 888	17 989
Engine Parts Industry	297 192	223 225	141 338	243 985	367 179	327 970	377 721	307 649	178 242	344 621
Wiring Assemblies	101 611	129 968	152 539	179 806	287 112	432 146	555 116	729 325	928 373	942 536
Stampings	214 284	334 498	319 945	275 001	253 634	142 853	97 126	88 077	131 801	182 018
Steering and Suspension	17 769	33 603	45 276	50 905	54 778	53 423	57 122	60 552	66 206	77 187
Wheel and Brake	14 224	18 449	21 805	27 893	34 047	39 090	48 468	66 991	65 194	71 506
Plastic Parts	2 747	3 965	3 098	1 681	3 655	12 134	12 010	9 731	6 503	422
Motor Vehicle Fabric	31 543	32 872	153 906	274 856	198 117	336 349	323 071	405 356	492 203	623 279
Other Motor Vehicle Parts	14 567	123 394	164 667	238 908	389 071	127 268	99 659	124 253	208 686	273 219
Total Imports	827 487	1 617 645	1 604 594	2 255 836	2 751 718	3 044 533	3 242 112	3 539 210	3 520 946	4 228 883
Trade Balances										
Motor Vehicle Industry	(133 212)	- 689 243	(601 938)	- 957 216	-1 098 486	-1 524 988	-1 605 215	-1 707 685	-1 392 712	-1 614 479
Truck/Body/Trailer	(302)	(623)	(50)	(253)	(4 368)	(4 729)	(2 339)	(2 862)	(30 762)	(17 951)
Engine Parts Industry	(272 847)	(210 087)	(121 305)	(218 018)	(342 233)	(259 252)	(311 027)	(234 611)	(115 264)	(276 970)
Wiring Assemblies	(101 072)	(129 784)	(152 196)	(178 957)	(286 637)	(431 758)	(554 990)	(729 251)	(928 019)	(942 213)
Stampings	(198 818)	(318 397)	(294 394)	(250 640)	(235 053)	(117 001)	(67 818)	(68 470)	(111 613)	(160 384)
Steering and Suspension	(14 115)	(29 442)	(39 792)	(46 066)	(49 779)	(44 553)	(49 981)	(51 917)	(57 230)	(66 484)
Wheel and Brake	(11 593)	(13 344)	(19 924)	(25 257)	(25 714)	(25 018)	(22 580)	(19 027)	(19 978)	(13 709)
Plastic Parts	5 234	3 572	7 727	9 107	5 033	(3 473)	(4 186)	(5 078)	25	5 670
Motor Vehicle Fabric	(26 380)	(24 700)	(147 528)	(264 821)	(188 670)	(327 577)	(317 310)	(401 263)	(479 434)	(573 693)
Other Motor Vehicle Parts	(38 580)	(53 722)	(75 686)	(177 008)	(361 549)	(46 232)	(15 423)	(20 523)	(112 333)	(128 891)
Total Exports and Imports	(714 525)	(1464 524)	(1445 086)	(2109 129)	(2587 456)	(2784 581)	(2950 869)	(3240 687)	(3247 320)	(3789 104)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Canadian Exports										
Motor Vehicle Industry	10 274	5 809	1 408	31 517	55 999	128 287	107 059	65 474	52 864	149 594
Truck/Body/Trailer	322	610	1 244	4 783	8 073	10 732	8 293	7 084	5 320	1 416
Engine Parts Industry	3 853	4 524	4 903	7 091	4 872	2 477	3 060	4 181	1 960	1 421
Wiring Assemblies	359	275	246	330	502	468	1 375	506	316	714
Stampings	532	1 018	1 660	3 064	3 217	1 278	930	4 391	2 244	1 467
Steering and Suspension	337	216	238	469	286	519	1 135	3 320	2 377	545
Wheel and Brake	36 712	32 396	30 164	37 257	40 900	22 171	30 714	32 025	17 806	9 129
Plastic Parts	570	791	1 078	1 943	2 197	615	492	1 320	673	455
Motor Vehicle Fabric	175	981	852	1 747	6 249	1 783	625	517	300	210
Other Motor Vehicle Parts	1 545	1 919	1 688	3 357	2 019	3 605	2 868	6 030	6 444	3 690
Total Exports	54 679	48 539	43 481	91 558	124 314	171 935	156 551	124 848	90 304	168 641
Canadian Imports										
Motor Vehicle Industry	2 836 622	3 179 607	3 292 664	2 375 035	1 717 583	1 404 984	1 247 317	2 504 739	2 616 302	3 015 220
Truck/Body/Trailer	1 879	1 188	1 273	2 031	1 503	2 124	1 837	2 739	3 904	7 730
Engine Parts Industry	418 912	425 444	563 454	658 953	844 181	807 937	814 129	702 870	398 003	667 962
Wiring Assemblies	39 040	35 215	42 693	52 859	51 624	54 824	67 239	49 502	59 838	69 690
Stampings	148 734	168 522	163 819	199 605	232 338	210 273	155 760	143 799	120 828	184 757
Steering and Suspension	49 591	62 467	66 222	90 576	84 629	95 561	68 911	60 690	76 344	94 483
Wheel and Brake	52 732	59 430	55 036	65 238	72 948	73 162	44 736	41 727	67 585	71 931
Plastic Parts	1 760	1 783	2 088	2 174	2 487	2 059	1 679	1 442	1 268	1 431
Motor Vehicle Fabric	9 268	8 114	8 850	5 571	2 677	7 471	4 551	5 120	4 138	2 194
Other Motor Vehicle Parts	408 730	446 296	442 753	511 326	569 546	688 372	512 181	455 421	731 851	788 716
Total Imports	3 967 268	4 388 066	4 638 852	3 963 368	3 579 516	3 346 767	2 918 340	3 968 049	4 080 061	4 904 114
Trade Balances										
Motor Vehicle Industry	(2826 348)	-3 173 798	(3291 256)	(2343 518)	(1661 584)	(1276 697)	(1140 258)	(2439 265)	(2563 438)	(2865 626)
Truck/Body/Trailer	(1 557)	(578)	(29)	(2 752)	(6 570)	(8 608)	(6 456)	(4 345)	(1 416)	(6 314)
Engine Parts Industry	(415 059)	(420 920)	(558 551)	(651 862)	(839 309)	(805 460)	(811 069)	(698 689)	(396 043)	(686 541)
Wiring Assemblies	(38 681)	(34 940)	(42 447)	(52 529)	(51 122)	(54 356)	(65 864)	(48 996)	(59 522)	(68 976)
Stampings	(148 202)	(167 504)	(162 159)	(196 541)	(229 121)	(208 995)	(154 830)	(139 408)	(118 584)	(183 290)
Steering and Suspension	(49 254)	(62 251)	(65 984)	(90 107)	(84 343)	(95 042)	(67 776)	(57 370)	(73 967)	(93 938)
Wheel and Brake	(16 020)	(27 034)	(24 872)	(27 981)	(32 048)	(50 991)	(14 022)	(9 702)	(49 779)	(62 802)
Plastic Parts	-1 190	-992	-1 010	-231	-290	(1 444)	(1 187)	(1 22)	-595	-976
Motor Vehicle Fabric	(9 093)	(7 133)	(7 998)	(3 824)	(3 572)	(5 688)	(3 926)	(4 603)	(3 838)	(1 984)
Other Motor Vehicle Parts	(407 185)	(444 377)	(441 065)	(507 969)	(567 527)	(684 767)	(509 313)	(449 391)	(725 404)	(785 026)
Total Exports and Imports	(3912 589)	(4339 527)	(4595 371)	(3871 810)	(3455 202)	(3174 832)	(2761 789)	(3843 201)	(3989 757)	(4735 473)

Canadian Trade in Automotive Products (Other Countries)

Table 4.5

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Canadian Exports										
Motor Vehicle Industry	196	208	285	482	526	827	457	444	389	414
Truck/Body/Trailer	6	10	3	4	6	6	7	8	11	12
Engine Parts Industry	76	85	86	107	110	138	123	93	81	89
Wiring Assemblies	11	11	12	15	25	18	21	16	20	17
Stampings	87	106	126	180	210	243	156	297	200	156
Steering and Suspension	15	19	18	38	42	58	54	43	26	24
Wheel and Brake	36	55	73	53	57	81	68	67	63	39
Plastic Parts	57	68	82	110	130	143	84	201	136	103
Motor Vehicle Fabric	37	44	54	72	86	95	56	134	92	69
Other Motor Vehicle Parts	110	136	123	218	257	428	334	363	170	229
Total Exports	631	742	862	1 279	1 449	2 037	1 360	1 666	1 188	1 152
Canadian Imports										
Motor Vehicle Industry	1 028	997	844	730	1 064	912	1 004	1 308	1 735	2 304
Truck/Body/Trailer	18	13	27	25	27	17	17	12	22	27
Engine Parts Industry	190	185	140	165	222	229	232	273	272	274
Wiring Assemblies	56	74	66	46	111	89	118	145	191	257
Stampings	143	115	112	105	122	99	121	132	136	115
Steering and Suspension	45	47	53	77	120	102	92	105	114	126
Wheel and Brake	120	172	172	146	169	171	201	229	235	262
Plastic Parts	4	5	5	8	9	4	5	5	1	3
Motor Vehicle Fabric	12	10	10	12	11	15	20	15	14	9
Other Motor Vehicle Parts	387	308	255	318	364	359	385	410	439	436
Total Imports	2 003	1 926	1 684	1 632	2 219	1 997	2 195	2 634	3 159	3 813
Trade Balances										
Motor Vehicle Industry	(832)	- 769	(559)	(248)	(538)	(85)	(547)	(864)	(1 346)	(1 890)
Truck/Body/Trailer	(12)	(3)	(24)	(21)	(21)	(11)	(10)	(4)	(11)	(15)
Engine Parts Industry	(114)	(100)	(54)	(56)	(112)	(91)	(109)	(180)	(191)	(185)
Wiring Assemblies	(45)	(63)	(60)	(31)	(86)	(71)	(97)	(129)	(171)	(240)
Stampings	(56)	(9)	(94)	(75)	(88)	(144)	(35)	(165)	(64)	(41)
Steering and Suspension	(30)	(28)	(20)	(39)	(78)	(44)	(38)	(192)	(88)	(102)
Wheel and Brake	(84)	(117)	(90)	(93)	(112)	(139)	(133)	(186)	(172)	(223)
Plastic Parts	53	63	49	102	121	(80)	(79)	(62)	135	100
Motor Vehicle Fabric	(25)	(34)	(113)	(60)	(75)	(80)	(36)	(186)	(78)	(60)
Other Motor Vehicle Parts	(277)	(172)	(132)	(100)	(107)	(69)	(51)	(276)	(269)	(207)
Total Exports and Imports	(1 372)	(1 184)	(822)	(353)	(770)	(40)	(835)	(2 271)	(1 971)	(2 661)



Employment

	1980	1985	1990	1995	1996	1997	1998*	1999*
Canada								
Total Manufacturing	112	152	154	167	167	159	172	176
Motor Vehicle Assembly (SIC 323)	45	57	56	54	50	51	54	54
Truck Bodies and Trailers (SIC 324)	15	11	12	12	15	16	18	18
Automotive Parts and Accessories (SIC 325)**	52	84	86	101	102	92	100	105
Total Retail	NA	310	368	351	355	380	365	364
Automotive Dealers/Distribution (SIC 631)	NA	96	129	128	130	158	143	144
Aftermarket (SIC 552, 633, 634, 635)***	NA	214	239	223	225	222	222	220
Total Automotive Industries	112	462	522	518	522	539	537	540
United States								
Total Manufacturing	853	946	869	1 029	1 032	1 047	1 051	1 073
Motor Vehicles (SIC 3711)	368	409	329	357	346	348	345	353
Truck and Bus Bodies (SIC 3713)	40	37	39	39	39	41	43	48
Parts and Accessories (SIC 3714)	350	394	400	516	530	544	547	553
Automotive Stampings (SIC 3465)	95	106	101	116	117	115	116	120
Total Retail	1740	2080	2245	2374	2456	2500	2518	2556
Automotive Dealers (SIC 551)	745	856	924	996	1 031	1 046	1 047	1 079
Aftermarket (SIC 501, 554, 7538)****	995	1 224	1 321	1 378	1 425	1 454	1 471	1 477
Total Automotive Industries	2 593	3 026	3 114	3 402	3 488	3 548	3 569	3 629
Mexico								
Vehicle manufacturers	NA	NA	58	42	44	49	54	57
Components industry	NA	NA	237	253	280	320	356	377
of which Maquiladora components industry	NA	NA	102	119	136	159	173	189
Dealer network	NA	65	69	52	57	68	87	N/A
Total Automotive Industries	NA	NA	364	347	381	437	497	434
Total North American Employment	2 705	3 488	4 000	4 267	4 391	4 524	4 603	4 603

* Figures for manufacturing are Survey of Earnings, Payroll and Hours (SEPH). Previous years are from the Census of Manufacturers

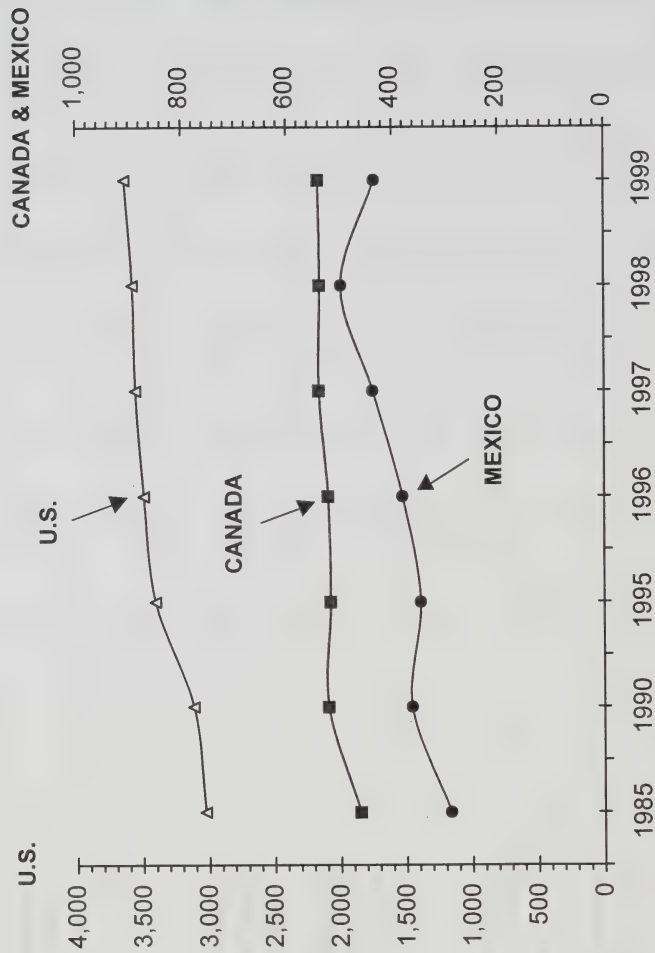
** Includes aftermarket manufacturing

*** Includes wholesale and retail stores, service stations and repair shops

**** Includes SIC 501 and 554 for 1972-1981 and SIC 554 only 1965-1971

North America Employment in Automotive Industries
(Annual Average)

Graph 5.1





Automotive Plants in Canada

Major Motor Vehicle Assembly Plants in Canada

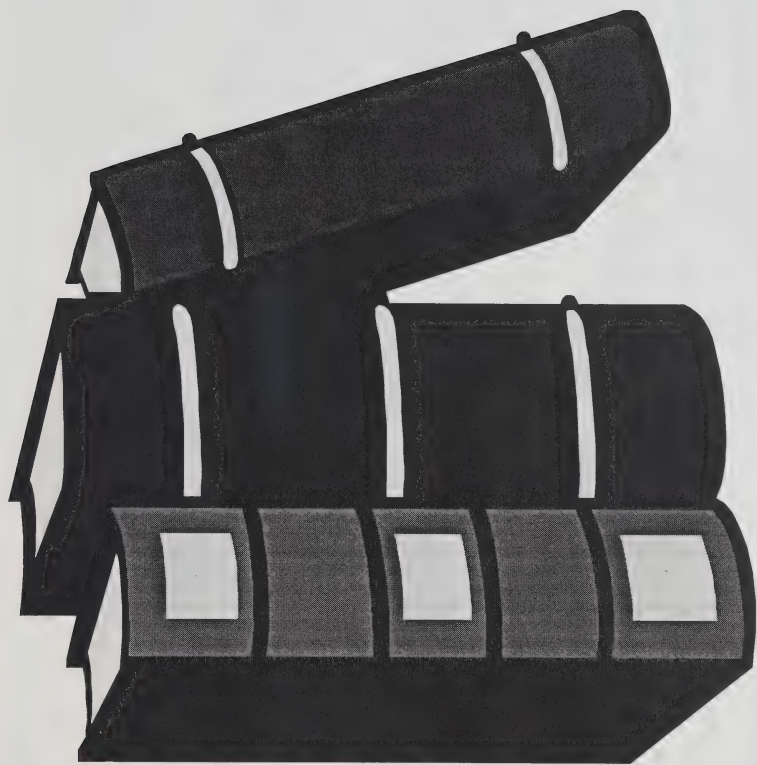
Table 6.1

Company/Plant Name	Location	Products
Light Vehicle Manufacturers		
Canadian Automobile Mfg. Inc. (CAMI) http://www.cami.ca/start.htm	Ingersoll, Ontario	Suzuki Swift, Suzuki Vitara, Chevrolet Tracker
Daimler Chrysler Canada Ltd. http://www.daimlerchrysler.ca	Bramalea, Ontario Windsor, Ontario	Concorde, Dodge Intrepid, LHS, 300M Dodge Caravan, Grand Caravan, Plymouth Voyager, Grand Voyager
Ford of Canada Ltd. http://www.ford.ca/fordFlash.html	Windsor, Ontario (Pilette Road) Oakville, Ontario	Dodge Ram, Ram wagon Windstar, F series
Honda Canada Manufacturing Inc. http://www.honda.ca	Oakville, Ontario St. Thomas, Ontario Alliston, Ontario	F series Crown Victoria, Mercury Grand Marquis Acura EL, Civic, Acura MD-X
General Motors of Canada Ltd. http://www.grcanada.com/english/home/home.html	Alliston, Ontario Oshawa, Ontario Oshawa, Ontario Oshawa, Ontario	Odyssey Lumina, Monte Carlo, Impala Century, Regal, Impala GMC Sierra (extended cab), Silverado (extended cab)
Toyota Motor Manufacturing Canada Inc. http://www.toyota.ca/toyota/homeE.html	Sainte-Thérèse, Quebec Cambridge, Ontario Cambridge, Ontario	Camaro/ Firebird Corolla Lexus RX-300
Heavy-Duty Truck Manufacturers		
Navistar International Corporation Canada http://www.navistar.com	Chatham, Ontario	Heavy-duty trucks
Sterling Trucks (Division of Freightliner of Canada Ltd. http://www.sterlingtrucks.com	St. Thomas, Ontario	Heavy-duty trucks
Western Star Trucks Inc. http://www.westernstarholdings.com	Kelowna, British Columbia	Heavy-duty trucks

Major Motor Vehicle Assembly Plants in Canada

Table 6.1

Bus Manufacturers	Brantford, Ontario Windsor, Ontario	School buses Mini-buses (10-15 passenger)
Canadian Bluebird Coach Ltd. DaimlerChrysler Canada Ltd. http://www.daimlerchrysler.ca	Ville de Laurentide, Quebec	School buses
Entreprise Michel Corbeil http://paiauto.com/kw	Drummondville, Quebec	Mini school buses
Girardin Inc. http://girardin.com/indexA.htm	Saint-Eustache, Quebec	Urban transit buses
Novabus http://novabus.com/index-e.htm	Winnipeg, Manitoba	Highway buses
Motor Coach Industries Ltd. http://www.motorcoach.ca	Winnipeg, Manitoba	Urban transit buses
New Flyer Industries Ltd. http://www.newflyer.com	Mississauga, Ontario	Urban transit buses
Orion http://www.transit-center.com/Orion	Sainte-Claire, Quebec	Highway buses
Prévost Car Inc. http://www.prevoستcar.com	Woodstock, Ontario	School buses
Thomas Built Buses of Canada http://www.thomasbus.com/index.html		



Glossary

Aftermarket (Replacement Market) - all products and services used in the repair and maintenance of vehicles.

Aftermarket part - goods not for use as original equipment in the production of light-duty vehicles or heavy-duty vehicles, i.e. products and services used in the repair and maintenance of these vehicles.

Agent or broker - an intermediary with legal authority to operate on behalf of the manufacturer.

American Automobile Labelling Act (AALA) - regulations requiring vehicle manufacturers to include content information on vehicle labels for cars and trucks for sale in the U.S. after October 1, 1994.

Anti-lock braking system (ABS) - System that automatically controls wheel slip or prevents sustained wheel-locking on braking.

Asia Pacific Economic Cooperation (APEC) - An organization established in 1989 to promote trade and investment in the Pacific Basin. APEC now comprises eighteen countries located in and around the Pacific Ocean: Australia, Brunei, Canada, Chile, China, Hong Kong, Indonesia, Japan, Malaysia, Mexico, New Zealand, Papua New Guinea, the Philippines, Singapore, South Korea, Taiwan, Thailand, and the United States.

Association of South East Asian Nations (ASEAN) - an organization of states (including Brunei, Myanmar, Burma, Indonesia, Laos, Malaysia, the Philippines, Singapore, Thailand, and Vietnam) founded in 1967 to present an united front that addresses the political, economic, and strategic dynamics of the region.

Automated Guided Vehicle System (AGVS) - vehicles equipped with automatic guidance equipment which follow a prescribed path, stopping at each machining or assembly station for manual loading and unloading of parts.

Autodealership or auto dealer - a retail outlet that carries one (or in some cases in the U.S., a number of) manufacturer's product line and sells to general consumers and fleet operators. The outlet will also provide service and sell parts for the brand of vehicle that it carries. In some instances, a dealer may dual for another manufacturer's product line.

Automobile - four-wheeled passenger motor vehicle having a seating capacity for not more than 10 people including police cars and racing cars but not including ambulances or hearses.

Auto parts store - jobber and retail auto parts stores which primarily sell automotive products and conduct business at the retail level.

Average weekly earnings - gross taxable payrolls divided by the number of employees.

Body shop - service outlet specializing in vehicle body repair work.

Bus - passenger motor vehicle or chassis having a seating capacity for more than 10 people.

Buying decisions - the act of determining whether or not a product purchase or repair, will be made, and/or which product or service will be purchased.

Glossary of Automotive Terms

Canada-U.S. Free Trade Agreement (FTA) - Implemented in January 1989 to eliminate all tariffs on U.S. and Canadian goods by January 1998 and to reduce or eliminate many non-tariff barriers.

Canadian Automotive Repair and Service Council (CARS) - a not-for-profit organization established to serve the human resource and training needs of the Canadian car and truck repair and service industry.

Canadian Environmental Protection Act (CEPA) - act where the goal is to pollution prevention and protection of Canadians from toxic substances.

Capacity - maximum production attainable under normal conditions. With regard to normal conditions, the company's operating practices are to be followed with respect to the use of production facilities, overtime, workshifts, holidays, etc.

Capital Expenditures - expenditures to acquire or add to capital assets that will yield benefits over several accounting periods. Included are cost of procuring, construction, installing new durable plants, machinery and equipment where for replacement, addition or for lease or rent to other companies including subsidies.

Captive Import - an imported motor vehicle or part manufactured by another automaker usually for sale under the brand name of the importer.

Casting - a process technology that delivers a liquid molten metal into a purpose-built mould. After cooling, the solid metal surface has the shape of the mould cavity.

Census value added - residual representing the difference between the value of goods and industrial services produced and the direct material costs associated with the production of goods.

Changeover - the refitting of equipment to either neutralize the effects of the just completed production or to prepare equipment for production of the next scheduled item, or both.

Climate Change - the international concern that increasing concentrations of greenhouse gases (GHGs) in the atmosphere are changing the climate in ways detrimental to our social and economic well-being.

Component - a raw material, ingredient, part or subassembly that at goes into a higher level assembly, compound, or other item.

Component assembly - a combination of two or more parts or sub-components to form an assembly.

Component Design - the activity for the design of specific components including responsibility for material, cost, weight, reliability, durability, function, appearance, serviceability.

Concept Vehicle - a current production vehicle modified for installation of new design concepts for evaluation of environmental functional feasibility.

Consumer factors - demographic characteristics of consumers including age, gender, income and geographic location, afford ability.

Corporate Average Fuel Economy (CAFE) - regulation enacted in 1975 which requires a motor vehicle manufacturer to classify its U.S. vehicle fleet sales as either domestic or import for the purpose of fuel economy averaging.

Glossary of Automotive Terms

Cost of production - actual cost to the manufacturer of producing a vehicle (does not include mark-up).

Customs duties - customs duties levied on imported goods under the Customs Tariff.

Days' Supply - number of days needed to sell all vehicles in inventory, based on the previous month's sales rate.

Dealer - a firm that buys and sells, adding some value for the consumer in the process. Dealer often means a firm which operates closer in the distribution channel to the consumer than a distributor or wholesaler, and may add more value for consumers than either of the above-mentioned terms.

Dealer principal - the individual or corporation that owns and controls one or a number of auto dealerships.

Die - solid or hollow form used for shaping materials by stamping, pressing, extruding, drawing or threading.

Diffusion - the way in which innovations spread through market or non-market channels.

Distributor - synonymous with wholesalers; distributors perform many of the same functions as wholesalers, such as selling, physical distribution, credit, etc. Some industries use the term distributor instead of wholesaler.

Distribution channel - is the path goods take as their title transfers from producer to consumer. The title transfer for consumer goods is usually accompanied by transfer of the physical goods, as well.

Do-it-Yourself Market (DIY) - the vehicle maintenance and repairs conducted by the vehicle owner or friend/relative who purchase auto parts from a retail outlet.

Door rates - the hourly rates charged by dealers on standardized units of service work. Hourly rates may or may not correspond to an actual hour of work.

Duty drawback - import duties or taxes repaid by a government in whole or in part, when the imported goods are re-exported or used in the manufacture of exported goods.

Duty paid value - in respect to imported goods, is the aggregate value for duty on imported goods.

Duty waiver - forgiveness, in whole or in part, of import duties when certain conditions are met.

Electric Vehicle - cars, buses, vans or trucks which use dedicated or hybrid electric systems as their power source.

Employment - total employment in each manufacturing facility, including total manufacturing employees, total support staff, and total engineering/R&D staff. Production workers relate to the average number actually engaged in the manufacturing process. Administrative and non-manufacturing includes employees at head offices and sales offices.

Employee Benefits - the provision of direct (salary, bonuses, etc.) indirect (vacation leave, medical and dental plans, etc.) and deferred employee compensation (pensions, etc.)

Glossary of Automotive Terms

Establishment - smallest operating entity producing a homogenous set of goods and services and is capable of reporting full range of production account variables to calculate "value added".

Free Trade Agreement of the Americas (FTAA) - an effort to unite the economies of the Western Hemisphere into a single free trade arrangement. The Heads of State of the 34 democracies in the region agreed to construct a "Free Trade Area of the Americas" and to complete negotiations for the agreement by 2005.

Finance & control - ownership of company (ie. Canadian, U.S., Japanese, German, etc.); public or private; capital investments: buildings, machinery and equipment, tooling programs

Firm - a business or institution comprising sole proprietorships, partnerships, companies and other forms of organizations.

Fixed or One Price Selling - published fixed price displayed on a new vehicle eliminating need for negotiation with the dealer.

Fixture - device for holding goods in process while working tools are in operation that does not contain any special arrangements for guiding the working tools.

Fleet sales - the purchase of vehicles by a business that meet a minimum requirement of units sold.

Forecast - prediction of future production or sales in the automotive industry.

Forging - a process that transforms solid metal into shapes of varying cross-sectional material thickness, often involving heating,

Franchise - establishment that has the right to exercise the powers of a corporation.

G7 (Group of Seven) - Seven industrial countries consisting of the United States, Japan, Germany, France, the United Kingdom, Italy and Canada, whose leaders have met at annual economic summits since 1975 to coordinate economic policies.

General Agreement on Tariffs and Trade (GATT) - Signed in 1947, the GATT was formal multilateral agreement aimed at expanding and liberalizing world trade. The World Trade Organization which is the successor to the GATT came into existence on January 1, 1995.

Generalized Preferential Tariff (GPT) - system of non-reciprocal tariff preferences for the benefit of developing countries. It grants duty-free or preferential entry to imports for eligible developing countries up to a certain dollar value or import percentage limit.

Greenhouse gases (GHGs) - group of gases which individually act to trap solar energy near the earth. GHGs for which emission levels have been estimated are carbon dioxide(CO₂), methane (CH₄), nitrous oxide (N₂O), sulphur hexafluoride (SF₆), carbon tetrafluoride (CF₄), carbon hexafluoride (C₂F₆) and hydro fluorocarbons (HFCs).

Grey market - the grey market describes the purchase by intermediaries of product which is not supplied to them by the "authorized" distribution channel of the supplier. Thus, a warehouse club in Canada that sells a stereo bought in the U.S. or elsewhere from other than the manufacturer is supplying grey market goods. While grey market products are frequently the same as would be available from conventional channels in Canada, the grey market assumes responsibility for service or repair where the manufacturer declines this support.

Glossary of Automotive Terms

Gross Vehicle Weight (GVW) -Maximum legal weight at which a vehicle can be operated.

Heavy-duty truck - vehicle weighing from 26,001 to 33,001 lbs. Also included off-highway trucks.

Ignition System - Electrical system devised to produce timed sparks from engine spark plugs. Consisting of a battery, induction coil, capacitor, distributor, spark plugs and relevant switches and wiring.

Importer - an organization that typically operates at arms length or under contractual agreement with manufacturers to bring products made in another country into Canada

Import Nameplate - vehicles sold by manufacturers primarily located outside North America whether assembled Overseas or in North America

Independent Repair Shop - small service outlet offering specialized repair services. They usually do not sell gasoline

Intellectual Property Rights (IPR) - the right to possess or control the use of intellectual property, such as trademarks, copyrights, patents and trade secrets.

Interchannel competition - rivalry between different channels of the distribution system. For example, independent retailers competing with manufacturers' outlets.

Intermediary - firm or organization that operates between the producer of the goods and the end purchaser. Thus, the members of the distribution channel noted above are intermediaries or "middlemen".

Intrachannel competition - rivalry between channel participants at the same level in the distribution channel. For example, department stores competing with one another.

Inventories - book value of inventory owned and held in Canada.

Jigs - device used in the accurate machining of good in process by holding the goods firmly and guiding tools exactly to position.

Joint venture - an international business collaboration between foreign interests and private parties from a host country in which two or more parties establish a new business enterprise to which each contributes and where ownership and control are shared.

Just-in-Time (JIT) - refers to the movement of material to the necessary place at the necessary time. It is part of a business philosophy based on achieving excellence in a manufacturing company through the continuous elimination of waste.

Kaizen activities - activity through which continuous improvement is sought.

Kyoto Protocol - international agreement among industrialized countries negotiated in Kyoto, Japan in December 1997 to reduce greenhouse gas emissions. Canada committed to reduce its greenhouse gas emissions by 6 percent of 1990 levels between 2008 and 2012.

Lease - form of contract transferring the use of a vehicle in consideration of payment.

Light truck - vehicle weighing less than 14,000 lbs.

Light vehicles - passenger cars and light trucks.

Glossary of Automotive Terms

Loss Leader - products whose prices are cut with the idea that they will attract customers to the store.

Make - brand name of a car or truck (i.e. Chevrolet, Ford, Dodge, Honda).

Manufacturer's Suggested Retail Price (MSRP) - Dealers typically sell at a discount to this price.

Machining - an operation which shapes metal parts by carving away excess material as chips produced in a sequential process of turning, milling and grinding operations.

Manufacturing - process technology (i.e. metal forming, machining, injection moulding, blow moulding, die casting, forgings, electronics/electrical, assembly, coating/plating); capacity utilization (in percent); production volumes; strategic alliances (e.g. joint ventures, technology agreements).

Market share - the percentage of total sales represented by an individual manufacturer/importer, make or nameplate.

Margin or gross margin - the return an intermediary achieves on the selling price of the article. That is, if the intermediary buys a product for \$1 and sells it for \$1.50, the margin is calculated. For example, .50 divided by \$1.50, or 33%.

Mark-up - Mark-up is the return an intermediary achieves on the cost price of an article. Using the same example described above, mark-up is .50 divided by \$1, or 50%.

Maquila (maquiladora) - Mexican assembly plant located near the U.S.-Mexican border where most production is exported to the United States.

Mechanic installed market (MIL) - vehicle maintenance and repair conducted by a mechanic/professional at a service outlet.

Medium-duty truck - vehicle weighing from 14,001 to 26,000 lbs.

Mercosur - the southern cone common market of Argentina, Brazil, Paraguay and Uruguay. Mercosur enacted a common external tariff on January 1, 1995 for almost 85 percent of tariff items of the four countries; most trade among members will be duty-free.

Metal forming - solid metal and molten metal process such as casting, forging, stamping and machining.

Methylcyclopentadienyl Manganese Tricarbonyl (MMT) - organic manganese compound used as a fuel additive to enhance octane levels in gasoline.

Model line - group of motor vehicles having the same platform or model name.

Model name - word, group of words, letter, number or similar designation assigned to a motor vehicle by a marketing division of a motor vehicle assembler.

Most-Favoured-Nation (MFN) Treatment - one country's commitment to extend to another country the lowest tariff rates that it applies to any third country.

Motor Vehicle Safety Act (MVSA) - act which regulates the manufacture and importation of motor vehicles and motor vehicle equipment to reduce risk of death, injury and damage to property and the environment.

Glossary of Automotive Terms

Mould - hollow form, matrix or cavity into which materials are placed to produce goods of desired shapes.

North American Industrial Classification System (NAICS) - Industry classification between Canada, the United States and Mexico to increase compatibility of data with these countries. The classification is based on establishment rather commodity. This classification system will be implemented with reference to year 1997 and data will be available in 1999.

Net sales value - the selling price received by the manufacturer for the vehicle including the cost of transporting the vehicle in Canada (includes mark-up).

New car dealer - major car dealership with a parts and service operation.

North American Free Trade Agreement (NAFTA) - Agreement creating free trade among the United States, Canada and Mexico. The NAFTA went into effect on January 1, 1994.

North American produced - motor vehicles assembled in Canada, the United States or Mexico.

Off-Highway Vehicle - Vehicle intended for operation on unmade surfaces or rough terrain (i.e. for construction or agriculture).

On Board Diagnostics (OBD) - a unit that monitors the Electronic Control Unit and system responses for errors during normal vehicle operations. When the vehicle is serviced, this information on the errors can be down loaded and displayed to the service personnel which will facilitate the trouble shooting process.

Operating profit - pre-tax earnings after deducting all operating expenses from gross margin.

Organization for Economic Co-operation and Development (OECD) - an organization whose purpose is to provide its 29 Member countries with a forum in which governments can compare their experiences, discuss the problems they share and seek solutions which can then be applied within their own national contexts. Each member country is committed to the principles of the market economy and pluralistic democracy.

Outlet - synonymous with vehicle dealership.

Overcapacity - the situation where maximum global production of automobiles exceeds the total global demand for automobiles.

Overtime - includes pay received for the number of hours worked in excess of the standard workday or workweek.

Partnership for a New Generation of Vehicles (PNGV) - established in 1993, this partnership, between the United States Federal Government and the automotive industry, was founded to establish global technical leadership in the development and production of affordable, fuel-efficient, low emission vehicles that meet today's performance standards.

Passenger vehicle - four wheeled motor vehicle that also includes mini-vans and sport utility vehicles.

Plastic moulding - a process that converts organic-based materials, by means of a general-purpose press and purpose-built tooling under controlled heat and pressure, and injects the hot material into a die cavity shaped in the final form of the intended part.

Glossary of Automotive Terms

Platform - primary load-bearing structural assembly of a motor vehicle determining the basic size of the motor vehicle, and is the structural base that supports the drive line and links the suspension components of the motor vehicle.

Process Innovation - a significant change in the technology of the production of an item which may involve new equipment, new management and organization methods.

Product Innovation - commercialization of a technologically changed product, whose design characteristics are changed in ways which deliver new or improved services to the consumer.

Pneumatic Tire - Flexible, hollow rubber forming the outer part of the vehicle wheel and inflated by air pressure.

Product design - the process of planning the product's specifications.

Product testing - rigorous methods whereby a product's quality and durability are measured.

Product planning - a function whereby an enterprise is responsible for the efficient, planning, scheduling and coordination of production activities.

Production engineering - planning and control of the mechanical means of changing the shape, condition of materials toward greater effectiveness and value.

Productivity - relative measure of output per labour and/or machine output.

Program cars - automobiles sold by manufacturers for fleet use. Usually applies to very large fleets, such as those of car rental companies.

Program Objectives - A consensus of what has been determined to be the most marketable product for a given model year.

Purchasing - total materials purchased for manufacturing/assembly into auto parts (ie. steel, plastics, rubber, textiles, etc.)

QDC - quick die change

Quality - conformance to requirements in relation to a degree of excellence.

Refit - closure of a plant for the purpose of plant conversion or retooling.

Registration - motor vehicle ownership that is filed with the province/state.

Research & development - R&D expenditures (product and process development).

SAE - Society of Automotive Engineers.

Sales - total automotive product sales (vehicles, automotive parts, including OE and aftermarket)

Scientific Research and Experimental Development (SR&ED)

Program - incentive for industrial research and development in Canada which allows individuals and companies to deduct 100 percent of qualified current SR and ED expenditures and capital SR and ED expenditures.

Glossary of Automotive Terms

Scrappage - a vehicle registered in the previous year but not re-registered in the current year.

Service station - outlets which sell gasoline and are operated by the major oil companies.

Shipments (value of) - summation of value of shipments produced by establishment, receipts of custom and repair revenue.

Special Import Measures Act (SIMA) - legislation that helps to protect Canadian producers from harm or injury caused by the dumping of goods into Canada by foreign exporters or the subsidizing of goods by foreign governments.

Special services - a category that describes plants which add value to automotive parts manufactured by others by using process such as painting, plating, heat treatment, etc.

Specialty repair shop - retail outlet which offers specialized vehicle products and service.

Stamping - a process technology which manufactures automotive parts by shaping rolled sheet metal or by bending or stretching it in a sequence of purpose-built tools fitted to a general purpose press.

Standard Industrial Classification (SIC) - industry class that represents a level of organization of production by type of specialization. Currently the 1980 Standard Industrial Classification is in effect identifying each industry at the 4 digit level. In 1997, the North American Industrial Classification System (NAICS) comes into effect.

Standard Work Week - average number of hours worked normally scheduled in a work week.

Subsidiary - a subsidiary is an organization operating in Canada that is owned or controlled by a foreign company which may or may not manufacture in Canada.

Supplier Cost Reduction Effort (SCORE) - a United States program that urges suppliers to develop processes to cut costs. Suppliers are allowed to keep half the savings and pass on the other half to the automakers.

SUV - Sports Utility Vehicle

Tariff - A duty or tax imposed on imports

Tier 1 Supplier - manufacturer to the vehicle assemblers who are responsible for delivery of the finished assembly, product development and continued technology renewal.

Tier 2 Supplier - producer of parts providing value-added to minor sub-assembly.

Tier 3 Supplier - supplier of engineered materials and special services, such as rolls of sheet steel, bars and heat treating, surface treatments.

Tire store - retail outlet selling tires and offering vehicle repair services.

Total Quality Management (TQM) - A management technique to improve the quality of goods and services, reduce operating costs and increase customer satisfaction.

Tool - device for use in, or attachment to, production machinery that is for the assembling of materials or the working of materials by

Glossary of Automotive Terms

turning, milling, grinding, polishing, drilling, punching, boring, shaping, shearing, pressing or planning.

Tooling - set of required standard or special tools needed to produce a particular part; includes jigs, fixtures, gages and cutting tools, but excluding machined tools.

Trim Level - vehicle designation assigned by vehicle manufacturers that represent specific equipment packages.

Used vehicle - vehicle that has been previously owned or driven.

United States Council for Automotive Research (USCAR) - an organization founded by Chrysler, Ford, and General Motors to strengthen the technology base of the domestic automotive industry through research and co-operation.

VA - Value analysis

VE - Value engineering

VER - Voluntary export restraint in relation to Japanese manufacturers exporting to Canada (no longer in effect).

VRA - Voluntary restraint agreement in relation to Japanese manufacturers exporting to the United States (no longer in effect).

Vehicle Identification Number (VIN) - Number assigned to a vehicle by the manufacturer primarily for registration and identification purposes (consisting of numerals and letters).

Windsor Experiment - Chrysler Canada, in partnership with government and educational institutions, has launched a number of initiatives collectively referred to as the Windsor Experiment. The

Windsor Experiment conducts studies to benchmark "best practice" training and education in Europe, and applied the results in various skills development programs.

World Trade Organization (WTO) - Created by the Uruguay Round and successor to the GATT, this new organization began operations on January 1, 1995.

Wholesaler - an intermediary which sells to other intermediaries, such as a firm that buys from a manufacturer and sells to a retailer.

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http://www.ftaa-alca.org/EnglishVersion/Alca_e.htm
<http://www.rc.gc.ca/sima/>
<http://www.oecd.org/>

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STATISTICAL REVIEW
OF THE CANADIAN AUTOMOTIVE
INDUSTRY: 2001 EDITION



Canada

**STATISTICAL REVIEW
OF THE CANADIAN AUTOMOTIVE
INDUSTRY: 2001 EDITION**

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August 2002



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7. Glossary of Automotive Terms

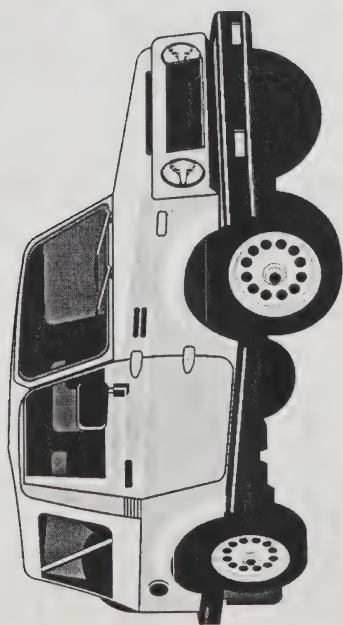
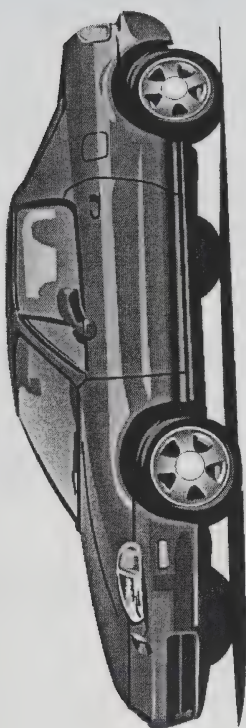
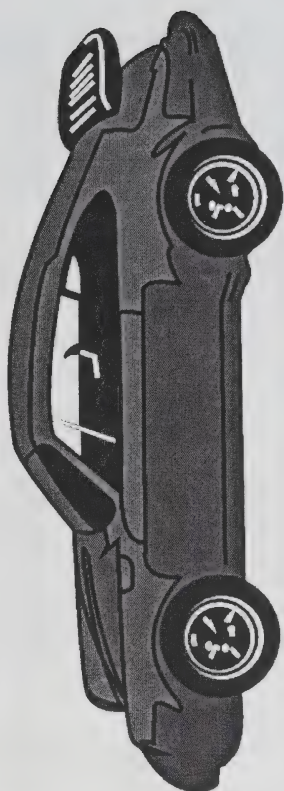
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This edition reflects the latest revisions and estimates provided by the various data sources. Accordingly, some historical figures appearing in the 2000 Edition have been modified. As a variety of sources are utilized in this publication, some totals may not agree. All the figures presented in this publication are based on the North American Industry Classification System (NAICS). Some of the figures are still calculated on the Standard Industrial Classification (SIC), as they are not yet available by NAICS.

Sale



	1992	1993	1994	1995	1996	1997	1998	1999	2000
Passenger Cars									
North American Produced*									
Daimler Chrysler	519	518	586	555	571	628	590	620	643
Ford	75	88	101	91	85	87	86	85	81
General Motors	124	124	124	109	113	115	99	88	100
Honda	235	214	235	227	215	242	222	258	255
Mazda	29	31	41	41	59	75	72	90	100
Nissan	6	12	11	8	6	7	6	5	3
Toyota	17	19	16	14	12	12	13	12	20
Other	19	10	33	40	50	57	49	45	39
	14	20	31	25	31	33	43	37	39
Total Imports	279	222	164	117	89	109	151	187	209
Total Imports from Europe	32	25	24	23	20	24	30	47	47
Total Imports from Japan	218	176	117	72	50	65	98	106	107
Total Imports from South Korea	27	21	23	22	19	20	23	34	51
From Other Sources	2	0	0	0	0	0	0	0	4
Total Passenger Cars	798	740	750	672	660	737	741	807	852
Light Trucks									
North American Produced*									
Daimler Chrysler	349	378	443	434	484	589	586	630	632
Ford	106	118	130	128	153	169	183	180	188
General Motors	106	118	139	141	157	199	170	188	178
Honda	132	135	161	153	161	203	199	213	214
Mazda	0	0	0	0	0	0	2	12	14
Nissan	0	0	7	4	4	4	4	5	7
Toyota	1	4	3	4	5	5	4	5	6
Other	0	0	0	2	2	6	18	19	16
	4	3	3	2	2	3	6	8	9
Total Imports	56	47	32	21	25	57	56	57	63
Total Imports from Europe	2	3	2	2	2	3	2	1	2
Total Imports from Japan	54	44	30	19	23	54	54	56	55
From Other Sources	0	0	0	0	0	0	0	0	6
Total Light Trucks	405	425	475	455	509	646	642	687	695
Total Light Vehicles	1 203	1 165	1 225	1 127	1 169	1 383	1 383	1 494	1 547

* Includes Mexico

Source: Ward's AutoInfoBank, AIAMC

Retail Sales of New Light Vehicles in U.S.
(Thousands of Units)

	1992	1993	1994	1995	1996	1997	1998	1999	2000
Passenger Cars									
North American Produced*	6 286	6 742	7 255	7 129	7 256	6 916	6 762	6 980	6 830
Daimler Chrysler	617	766	783	771	828	737	739	745	649
Ford	1 731	1 837	1 899	1 732	1 700	1 576	1 532	1 581	1 527
General Motors	2 750	2 852	3 053	2 931	2 756	2 635	2 401	2 537	2 475
Honda	476	418	465	511	666	665	731	703	716
Mazda	79	100	109	106	86	79	92	87	71
Mitsubishi	65	76	117	101	126	101	102	137	168
Nissan	145	250	313	300	293	293	252	218	236
Toyota	341	368	384	499	556	594	623	637	632
Other	82	75	132	178	229	236	290	335	356
Total Imports	1 927	1 776	1 735	1 506	1 271	1 355	1 380	1 719	2 016
Total Imports from Europe	308	292	312	340	372	436	528	674	729
Total Imports from Japan	1 452	1 328	1 239	982	726	726	691	758	863
Total Imports from South Korea	144	135	173	183	172	182	152	277	401
From Other Sources	23	21	11	1	1	11	9	10	23
Total Passenger Cars	8 213	8 518	8 990	8 635	8 527	8 271	8 142	8 699	8 846
Light Trucks									
North American Produced*	4 247	5 000	5 659	5 691	6 132	6 271	6 745	7 421	7 651
General Motors	1 545	1 746	1 943	1 895	1 972	2 040	2 110	2 379	2 376
Ford	1 397	1 663	1 850	1 977	2 070	2 172	2 300	2 385	2 427
Daimler Chrysler	1 028	1 212	1 392	1 378	1 618	1 567	1 771	1 893	1 873
Honda	0	0	26	28	28	23	33	101	158
Mazda	8	30	64	45	43	38	42	39	51
Nissan	130	156	173	181	174	169	122	189	240
Toyota	65	112	130	113	142	161	234	297	361
Other	74	81	81	74	85	101	133	138	165
Total Imports	408	378	410	402	439	580	656	775	853
Total Imports from Europe	7	11	17	21	24	26	23	33	38
Total Imports from Japan	401	367	393	373	405	534	604	690	742
From Other Sources	0	0	0	8	10	20	29	52	73
Total Light Trucks	4 655	5 378	6 069	6 093	6 571	6 851	7 401	8 196	8 504
Total Light Vehicles	12 868	13 896	15 059	14 728	15 098	15 122	15 543	16 895	17 350

* includes Mexico

Source: Ward's AutoInfoBank

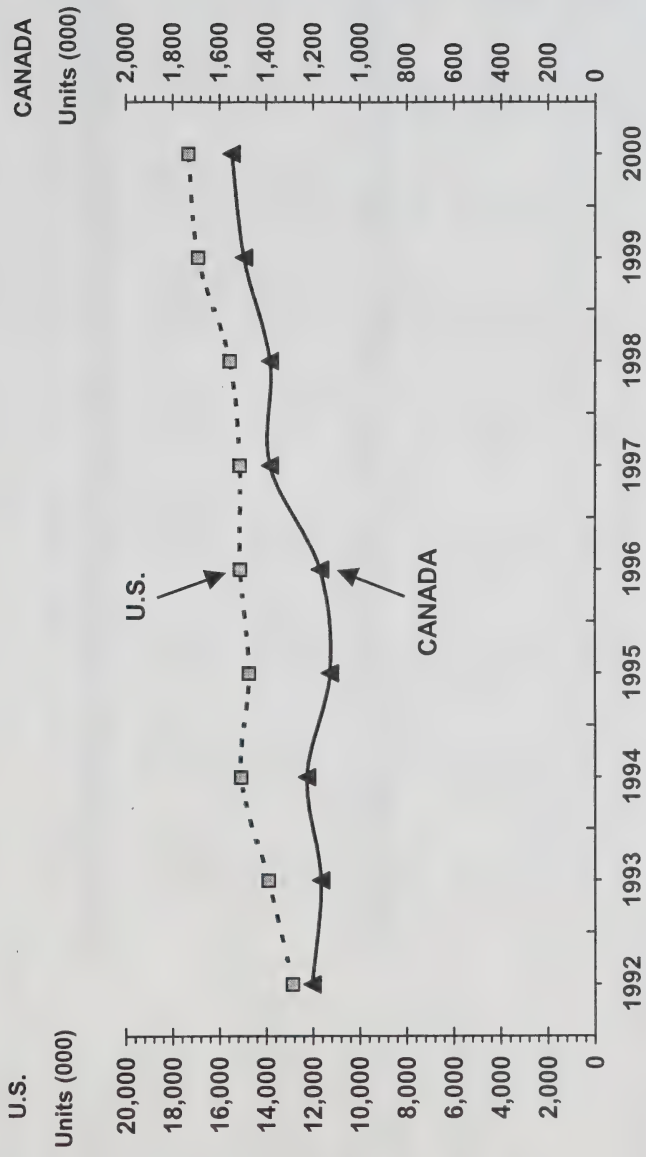


Table 1.3

Canadian Car Sales by Size*
(Thousands of Units)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Compact	480	405	355	335	288	276	309	311	339	426
Percent Share of Total	54.8	50.6	48.0	44.7	42.9	41.8	41.8	42.0	42.0	50.1
Percentage Change	-0.6	-15.6	-26.5	-5.6	-14.0	-4.2	12.0	0.6	9.0	25.7
Intermediate	293	306	281	294	272	279	313	318	344	302
Percent Share of Total	33.4	38.3	38.0	39.2	40.5	42.2	42.4	42.9	42.6	35.5
Percentage Change	5.0	4.4	0.7	4.6	-7.5	2.6	12.2	1.6	8.2	-12.2
Full-size	50	41	58	73	63	55	51	47	48	43
Percent Share of Total	5.7	5.1	7.8	9.7	9.4	8.3	6.9	6.3	5.9	5.1
Percentage Change	-35.1	-18.0	-24.7	25.9	-13.7	-12.7	-7.3	-7.8	2.1	-10.4
Luxury	53	48	46	48	48	51	66	65	76	79
Percent Share of Total	6.1	6.0	6.2	6.4	7.2	7.7	8.9	8.8	9.4	9.3
Percentage Change	15.2	-9.4	0.0	4.3	0.0	6.3	29.4	-1.5	16.9	3.9
Total Sales	876	800	740	750	671	661	739	741	807	850

* Classified by Ward's segmentation

Table 1.4

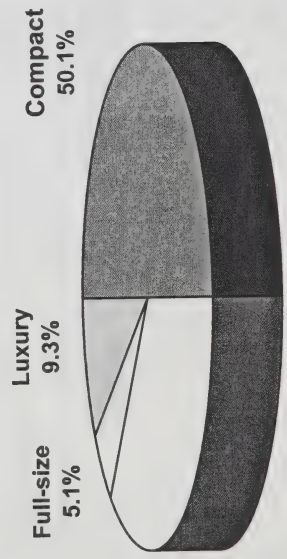
U.S. Car Sales by Size*
(Thousands of Units)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Compact	2 839	2 704	2 773	2 601	2 286	2 250	2 117	1 951	2 061	2 486
Percent Share of Total	34.7	32.9	32.6	28.9	26.5	26.4	25.6	24.0	23.7	28.1
Percentage Change	-8.3	-4.8	2.6	-6.2	-12.1	-1.6	-5.9	-7.8	5.6	20.6
Intermediate	3 502	3 633	3 696	4 120	4 244	4 286	4 152	4 221	4 545	4 227
Percent Share of Total	42.8	44.2	43.4	45.8	49.1	50.3	50.2	51.8	52.3	47.8
Percentage Change	-15.5	3.7	1.7	11.5	3.0	1.0	-3.1	1.7	7.7	-7.0
Full-size	685	752	943	1 054	932	843	782	669	660	623
Percent Share of Total	8.4	9.2	11.1	11.7	10.8	9.9	9.5	8.2	7.6	7.0
Percentage Change	-21.9	9.8	25.4	11.8	-11.6	-9.5	-7.2	-14.5	-1.3	-5.6
Luxury	1 164	1 124	1 106	1 216	1 173	1 147	1 221	1 301	1 432	1 510
Percent Share of Total	14.2	13.7	13.0	13.5	13.6	13.5	14.8	16.0	16.5	17.1
Percentage Change	-8.2	-3.4	-1.6	9.9	-3.5	-2.2	6.5	6.6	10.1	5.4
Total Sales	8 190	8 213	8 518	8 991	8 635	8 526	8 272	8 142	8 698	8 846

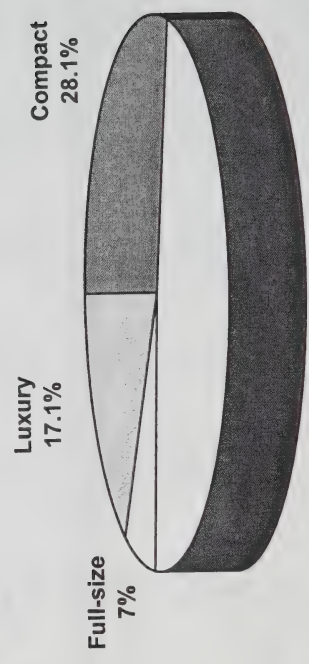
* Classified by Ward's segmentation

Source: Ward's Automotive Reports, Ward's Yearbook, Ward's AutoInfoBank

CANADA



UNITED STATES



Canadian and U.S. Light Truck Sales by Segment*
(Units)

Table 1.5

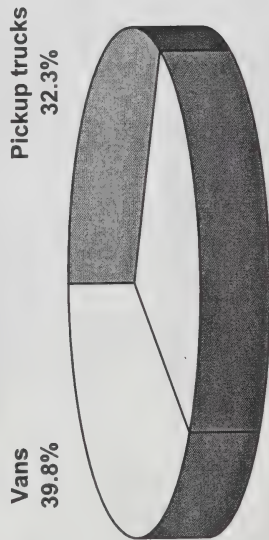
	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Canada**										
Pickup trucks	168 528	161 899	158 259	184 877	174 464	196 444	233 846	226 599	226 802	224 125
Percent Share of Total	43.3	40.2	37.5	39.2	38.3	38.6	36.3	35.3	33.0	32.3
Percentage Change	-9.1	-3.9	-2.2	16.8	-5.6	12.6	19.0	-3.1	0.1	-1.2
Sports Utility Vehicles	73 060	73 051	77 014	80 115	86 839	98 380	152 378	159 554	179 192	194 386
Percent Share of Total	18.8	18.2	18.3	17.0	19.0	19.3	23.6	24.9	26.1	28.0
Percentage Change	2.3	0.0	5.4	4.0	8.4	13.3	54.9	4.7	12.3	8.5
Vans	147 381	167 305	186 571	206 849	194 765	213 810	258 864	255 818	281 659	276 360
Percent Share of Total	37.9	41.6	44.2	43.8	42.7	42.0	40.1	39.8	41.0	39.8
Percentage Change	1.5	13.5	11.5	10.9	-5.8	9.8	21.1	-1.2	10.1	-1.9
Total	388 969	402 255	421 844	471 841	456 068	508 634	645 088	641 971	687 653	694 871
Percentage Change	-3.2	3.4	4.9	11.9	-3.3	11.5	26.8	-0.5	7.1	1.0
United States**										
Pickup trucks	2 020 739	2 145 389	2 417 230	2 792 063	2 656 949	2 810 868	2 769 562	2 959 749	3 193 458	3 182 020
Percent Share of Total	49.1	46.4	45.3	46.4	43.9	43.0	40.6	40.2	39.1	37.5
Percentage Change	-11.9	6.2	12.7	15.5	-4.8	5.8	-1.5	6.9	7.9	-0.4
Sports Utility Vehicles	909 555	1 133 141	1 379 600	1 556 075	1 753 417	2 140 455	2 435 301	2 794 206	3 218 503	3 519 575
Percent Share of Total	22.1	24.5	25.8	25.8	29.0	32.8	35.7	37.9	39.4	41.5
Percentage Change	-2.1	24.6	21.8	12.8	12.7	22.1	13.8	14.7	15.2	9.4
Vans	1 181 349	1 341 062	1 541 122	1 674 719	1 642 269	1 582 590	1 609 681	1 615 181	1 759 510	1 784 127
Percent Share of Total	28.7	29.0	28.9	27.8	27.1	24.2	23.6	21.9	21.5	21.0
Percentage Change	-9.8	13.5	14.9	8.7	-1.9	-3.6	1.7	0.3	8.9	1.4
Total	4 111 643	4 619 592	5 337 952	6 022 857	6 052 635	6 533 913	6 814 544	7 369 136	8 171 471	8 485 722
Percentage Change	-9.3	12.4	15.6	12.8	0.5	8.0	4.3	8.1	10.9	3.8

* Classified by Ward's segmentation

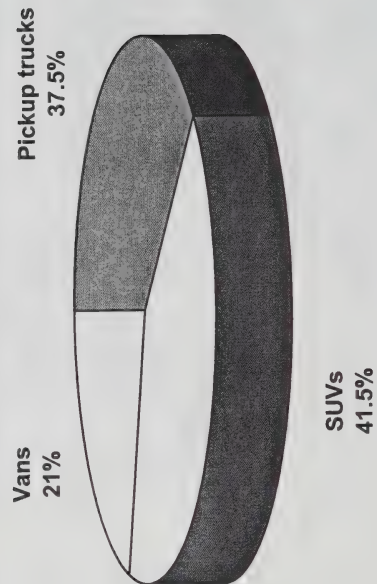
** Commercial Chassis are not included in totals

Source: Ward's AutoInfoBank

CANADA



UNITED STATES



**Motor Vehicle Registrations in Canada
(Thousands of Units)**

Table 1.6

	1988	1989	1990	1993	1994	1995	1996	1997	1998	1999*	2000
Passenger Cars	12 086	12 811	12 622	12 925	13 131	13 192	13 251	13 487	13 887	16 538	16 832
Trucks and Truck Tractors	3 706	3 396	3 867	3 345	3 393	3 411	3 476	3 527	3 625	2 607	2 418
Buses	60	62	64	65	65	64	64	65	68	73	77
Motorcycles	370	348	331	309	306	297	290	299	314	274	311
Mopeds	31	30	28	26	24	22	21	20	20	N/A	N/A
Other Vehicles	84	72	69	61	63	60	60	80	73	N/A	N/A
Total	16 337	16 719	16 981	16 731	16 982	17 046	17 162	17 478	17 987	19 492	19 638

* Different grouping used for 1999; mopeds included in motorcycles

Table 1.7

Motor Vehicle Registrations in Major Markets
(Thousands of Units)

	1980	1985	1990	1994	1995	1996	1997	1998	1999	2000
Australia	7 263	8 729	9 777	10 518	10 651	10 750	11 351	11 765	11 901	12 228
Belgium	3 513	3 634	4 277	4 619	4 696	4 780	4 862	5 001	5 119	5 256
Canada	13 719	14 818	16 553	17 440	17 046	17 231	17 478	17 987	17 964	18 285
France	21 705	25 070	28 460	30 040	30 295	30 755	31 470	32 310	33 090	33 813
Germany	24 853	27 822	32 685	42 545	43 319	43 971	44 552	44 979	45 793	47 306
Italy	19 115	24 405	29 910	32 455	33 164	33 736	34 398	34 596	35 363	36 165
Japan	37 856	46 157	57 678	65 011	66 854	68 801	70 003	70 815	71 727	72 649
Mexico	5 829	7 476	9 882	11 530	11 825	12 230	12 700	13 891	13 891	14 850
Netherlands	4 889	5 330	6 091	6 211	6 290	6 420	6 670	6 640	6 894	7 190
Spain	8 962	10 884	14 443	16 687	17 284	17 954	18 657	19 612	20 636	21 427
Sweden	3 077	3 383	3 925	3 912	3 953	3 982	4 040	4 145	4 259	4 387
U.K.	17 358	22 231	26 302	26 926	27 431	28 021	28 816	30 406	30 970	31 463
U.S.	188 796	171 354	188 656	195 469	200 446	206 365	207 754	209 750	216 309	221 474
Total	356 935	371 293	428 639	463 363	473 254	484 996	492 751	501 897	502 015	526 493

Source: Data was compiled from various sources such as governments and associations' Internet-based databases, other printed publications, National Institute of Statistics (INEGI), Kama

Passenger Cars

2000		1999	
1	Honda Civic	1	Honda Civic
2	Ford Focus	2	Chevrolet Cavalier
3	Chevrolet Cavalier	3	Pontiac Sunfire
4	Pontiac Sunfire	4	Toyota Corolla
5	Toyota Corolla	5	Chrysler Neon
6	Chrysler Neon	6	Ford Taurus
7	Mazda Protegé	7	Dodge Intrepid
8	Ford Taurus	8	Chevrolet Malibu
9	Pontiac Grand Am	9	Pontiac Grand Am
10	Honda Accord	10	Mazda Protegé
11	Toyota Echo	11	Honda Accord
12	Chevrolet Malibu	12	Toyota Camry
13	Dodge Intrepid	13	Toyota Tercel*
14	Volkswagen Jetta	14	Volkswagen Jetta
15	Accent Hyundai	15	Escort

* Toyota Tercel replaced by Toyota Echo in 2000

Top 15 Best Selling Light Trucks in Canada - 1999 and 2000
(Units)

Table 1.9

Light Trucks

		<u>2000</u>		<u>1999</u>	
1	Dodge Caravan	87 737	1	Dodge Caravan	73 930
2	Ford F-Series	71 115	2	Ford F-Series	73 748
3	Ford Windstar	49 636	3	Ford Windstar	55 528
4	Chevy Silverado	37 408	4	GMC-Sierra	36 829
5	GMC-Sierra	35 159	5	Chevy Silverado	34 234
6	Dodge Ram Pickup	29 124	6	Dodge Ram Pickup	30 064
7	Pontiac Montana	26 906	7	Ford Explorer	24 928
8	Chevrolet Venture	24 759	8	Chevrolet Venture	23 151
9	Ford Explorer	23 201	9	Jeep Grand Cherokee	19 003
10	Dodge Dakota	18 124	10	Pontiac Trans Sport*	17 838
11	Jeep Grand Cherokee	15 842	11	Toyota Sienna	15 763
12	Ford Econoline	14 534	12	Plymouth Voyager**	15 711
13	Honda CR-V	13 726	13	Ford Econoline	14 835
14	Odyssey Honda	13 512	14	Honda CR-V	14 511
15	PT Cruiser Chrysler	11 091	15	Dodge Dakota	14 411

* Pontiac Trans Sport replaced by Pontiac Montana in 2000

** Plymouth Voyager replaced by Chrysler Voyager in 2000

Company	1985	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Acura	--	--	41	44	44	44	42	39	39	41	48	42	42
American Motors	189	--	--	--	--	--	--	--	--	--	--	--	--
BMW	43	42	38	38	38	35	36	33	33	30	31	31	32
Daimler Chrysler	555	695	659	622	606	601	607	609	598	586	570	570	547
Daewoo	--	--	--	--	--	--	--	--	--	--	11	11	41
Fiat	88	--	--	--	--	--	--	--	--	--	--	--	--
Ford	715	669	655	641	641	643	640	623	604	597	577	577	552
General Motors	969	964	947	938	918	906	868	847	824	868	848	848	768
Honda	188	256	218	219	217	217	213	205	203	203	206	205	209
Hyundai	173	157	144	151	145	156	146	139	139	142	143	143	146
Infiniti *	--	--	--	--	20	23	22	22	23	--	--	--	23
Jaguar	20	23	23	22	20	21	21	20	18	18	19	19	21
Kia	--	--	--	--	--	--	--	--	--	--	--	28	90
Lada	76	61	69	50	63	78	77	89	75	22	21	21	17
Land Rover	--	--	--	--	--	--	--	--	--	--	13	13	16
Lexus **	--	--	--	--	22	22	22	22	22	--	--	--	22
Mazda	137	168	176	175	185	184	181	176	167	159	151	151	149
Mercedes-Benz	53	54	56	55	55	39	57	58	56	53	49	49	51
Nissan	188	180	179	173	168	161	156	148	146	169	165	165	139
Passport/Saturn ***	--	59	70	63	67	66	65	62	--	--	--	--	--
Porsche	--	--	--	--	--	--	--	--	--	--	11	11	11
Saab ***	41	32	--	--	--	--	--	--	--	--	--	--	--
Skocar	60	23	34	30	30	--	--	--	--	--	--	--	--
Subaru	80	89	87	90	91	87	93	95	97	100	97	97	96
Suzuki	86	103	107	101	100	103	106	108	91	86	89	89	90
Toyota	208	237	239	241	236	234	232	229	228	251	251	251	228
Volkswagen/Audi	200	189	184	187	181	180	174	162	160	155	190	190	188
Volvo	72	61	61	57	52	53	51	48	46	46	45	45	44
Total Light Vehicle Dealers	4 141	4 062	3 987	3 997	3 901	3 853	3 809	3 734	3 569	3 526	3 535	3 556	3 522

* Figures are included with Nissan in 1997

** Figures are included with Toyota in 1997

*** Figures are included with General Motors starting in 1996

Source: Canadian Automobile Dealers Association (CADA)



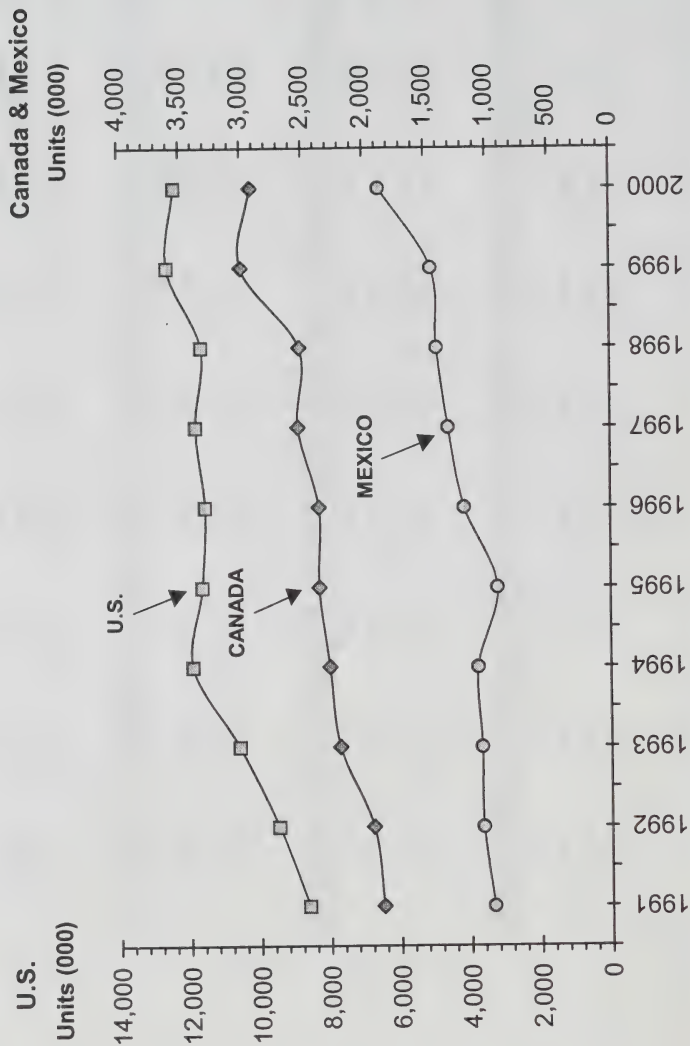
PRODUCTION

North American Production of Motor Vehicles
(Thousands of Units)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Canada										
Passenger Cars	1 060	1 028	1 353	1 216	1 337	1 280	1 373	1 481	1 626	1 551
Light Trucks	796	907	852	1 069	1 030	1 088	1 161	1 040	1 370	1 365
Light Vehicles	1 856	1 935	2 205	2 285	2 367	2 368	2 534	2 521	2 996	2 916
Heavy-Duty Trucks*	31	38	49	36	41	29	37	49	61	46
Total Vehicles	1 887	1 973	2 254	2 321	2 408	2 397	2 571	2 570	3 057	2 962
U.S.										
Passenger Cars	5 440	5 667	5 982	6 601	6 340	6 083	5 934	5 554	5 638	5 542
Light Trucks	3 177	3 808	4 608	5 305	5 285	5 449	5 859	6 074	6 955	6 840
Light Vehicles	8 617	9 475	10 590	11 906	11 625	11 532	11 793	11 628	12 593	12 382
Heavy-Duty Trucks*	173	217	265	333	370	299	338	374	432	391
Total Vehicles	8 790	9 692	10 855	12 239	11 995	11 831	12 131	12 002	13 025	12 773
Mexico										
Passenger Cars	720	776	835	857	699	798	855	956	994	1 130
Light Trucks	235	264	213	220	217	386	454	445	451	738
Light Vehicles	955	1 040	1 048	1 077	916	1 184	1 309	1 401	1 445	1 868
Heavy-Duty Trucks*	31	38	29	45	18	34	46	59	89	55
Total Vehicles	986	1 078	1 077	1 122	934	1 218	1 355	1 460	1 534	1 923
North America Total										
Passenger Cars	7 220	7 471	8 170	8 674	8 376	8 161	8 162	7 991	8 258	8 223
Light Trucks	4 208	4 979	5 673	6 594	6 532	6 923	7 474	7 559	8 776	8 943
Light Vehicles	11 428	12 450	13 843	15 268	14 908	15 084	15 636	15 550	17 034	17 166
Heavy-Duty Trucks*	235	293	343	414	429	362	421	482	582	492
Total Vehicles	11 663	12 743	14 186	15 682	15 337	15 446	16 057	16 032	17 616	17 658

* Includes motor homes and chassis

Source: Ward's AutoInfoBank



Vehicle Manufacturers by Total Output (Thousands of Units)

Company

Ranked by 2000 North American Production*								
	1997 Ranking	1998 Ranking	1999 Ranking	2000 Ranking				
General Motors	5 472	1	4 974	1	5 739	1	5 630	1
Ford	4 396	2	4 329	2	4 580	2	4 668	2
DaimlerChrysler	2 686	3	2 910	3	3 090	3	2 896	3
Honda	816	4	882	5	971	4	1 023	4
Toyota	541	6	648	4	745	5	809	5
Nissan	571	5	499	6	510	6	691	6
Volkswagen	257	8	339	8	410	7	426	7
NUMMI	358	7	362	7	367	8	344	8
Diamond Star	189	9	157	11	160	11	222	9
Subaru-Isuzu	187	10	216	9	192	9	209	10
CAMI	100	12	45	12	112	12	108	11
Auto Alliance (formerly Mazda)	100	11	167	10	165	10	107	12
Ranked by 2000 World Production								
General Motors	8 342	1	7 582	1	8 236	1	8 114	1
Ford	6 822	2	6 556	2	6 665	2	7 206	2
Toyota	4 834	3	5 210	3	5 496	3	5 897	3
Renault**	1 919	9	2 284	7	4 802	5	5 213	4
Volkswagen	3 148	4	4 809	4	4 786	6	5 106	5
DaimlerChrysler	3 034	5	4 512	5	4 822	4	4 666	6
Peugeot-Citroen	2 069	8	2 248	9	2 515	8	2 879	7
Fiat-Iveco	2 520	6	2 696	6	2 624	7	2 639	8
Hyundai	1 370	12	899	12	1 970	10	2 488	9
Honda	2 269	7	2 329	8	2 425	9	2 469	10
Mitsubishi	1 528	10	1 591	10	1 555	11	1 613	11
Suzuki	1 467	11	1 298	11	1 521	12	1 434	12

* Includes Mexico

** Including Nissan from 1999

Source: Ward's Automotive Yearbook

Table 2.3

Motor Vehicle Production by Major Producing Country
(Thousands of Units)

	1975	1980	1985	1990	1995	1996	1997	1998	1999	2000
U.S.	8 965	8 010	11 648	9 768	11 972	11 832	12 131	12 003	13 025	12 771
Japan	6 941	11 043	12 271	13 487	10 195	10 346	10 976	10 050	9 895	10 145
Germany	3 186	3 879	4 446	4 661	4 515	4 351	5 023	5 727	5 688	5 527
France	2 861	3 378	3 016	3 295	2 740	2 728	2 549	2 923	3 352	3 352
Spain	814	1 182	1 418	1 679	2 308	2 412	2 562	2 826	2 852	3 033
Canada	1 442	1 374	1 930	1 922	2 401	2 397	2 570	2 570	3 057	2 962
South Korea	36	123	378	1 322	2 679	2 813	2 410	1 787	2 604	2 858
Mexico	NA	NA	398	804	944	1 222	1 355	1 460	1 534	1 923
U.K.	1 648	1 313	1 311	1 296	1 738	1 929	1 936	1 976	1 973	1 814
Italy	1 459	1 612	1 573	1 875	1 623	1 547	1 817	1 693	1 701	1 738
Brazil	930	1 165	967	914	1 650	1 813	2 059	1 547	1 351	1 671
Russia	1 964	2 199	2 200	2 000	1 276	1 077	1 174	1 021	1 170	1 203

Table 2.4

Average Unit Value of Canadian Produced Motor Vehicles

	1992	1993	1994	1995	1996	1997	1998	1999	2000
Number of Units Produced (Thousands)	1 973	2 254	2 321	2 408	2 397	2 571	2 570	3 057	2 962
Value of Shipments* (NAICS 3361) (Millions of Dollars)	29 573	37 810	44 581	49 477	47 904	52 715	57 603	73 707	73 016
Unit Value (Dollars)	14 989	16 775	19 208	20 547	19 985	20 504	22 414	24 111	24 651

* Preliminary data based on Statistics Canada Catalogue Number 31-001-XPB

Source: Statistics Canada and Ward's Automotive Yearbook

Table 2.5

Industrial Product Price Indices* by Industry (1997=100)

	1993	1994	1995	1996	1997	1998	1999	2000
Motor Vehicle Industry (NAICS 3361)	85.5	90.5	93.4	96.5	100.0	109.5	111.5	111.7
Trailer and Bus Body and Trailer Industry (NAICS 3362)	91.1	94.0	98.2	97.8	100.0	102.4	103.9	106.5
Motor Vehicle Parts and Accessories Industry (NAICS 3363)	92.6	95.2	97.9	99.9	100.0	103.2	103.3	103.2

* The Industrial Product Price Indices (IPPI) measure price changes for major commodities sold by Canadian manufacturers

**Value of Shipments in Canadian Automotive Industries
(Millions of Dollars)**

Table 2.6

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Motor Vehicle Manufacturers	29 573	37 810	44 581	49 477	47 904	52 715	57 603	73 707	73 016	62 234
Truck Body and Trailer Manufacturers	947	1 138	1 464	1 858	1 997	2 274	2 652	2 657	2 726	2 488
Motor Vehicle Parts and Accessories Manufacturers	12 833	14 741	17 360	19 750	21 059	24 121	26 045	30 424	31 117	29 829
Tire Manufacturing	1 342	1 485	1 570	1 719	1 760	1 810	1 905	2 142	2 809	2 522
Total	44 695	55 174	64 975	72 804	72 720	80 920	88 205	108 930	109 668	97 073

NOTE: All calculations are based on North American Industrial Classification System (NAICS)

Source: Statistics Canada Catalogue Numbers 31-001-XPB, 31-203-XPB and 42-251-XPB

Table 2.7

Canadian Light Vehicle Production by Company

(Units)

	1993	1994	1995	1996	1997	1998	1999	2000	2000 % Market Share
CAMI (GM/Suzuki)	159 399	170 231	183 510	124 100	99 770	45 063	112 314	107 651	3.69
DaimlerChrysler	643 371	695 630	538 097	705 446	627 157	738 321	796 727	704 081	24.15
Ford	454 165	494 829	533 443	537 082	630 829	627 384	685 535	629 646	21.60
GM	747 471	723 903	907 833	752 371	894 974	750 907	915 507	963 409	33.05
Honda	100 621	108 308	106 133	144 482	165 181	179 797	274 908	326 823	11.21
Hyundai	14 585	0	0	0	0	0	0	0	0.00
Toyota	79 219	85 871	90 136	97 344	108 952	171 739	211 082	183 739	6.30
Volvo	5 504	6 436	7 588	7 127	6 548	8 373	0	0	0.00
Total Production	2 204 335	2 285 208	2 366 740	2 367 952	2 533 411	2 521 584	2 996 073	2 915 349	100.00

U.S. Light Vehicle Production by Company
(Units)

Table 2.8

	1993	1994	1995	1996	1997	1998	1999	2000	2000 % Market Share
Auto Alliance (Ford/Mazda)	219 096	247 004	149 562	129 441	100 394	167 268	165 143	107 431	0.87
BMW	0	385	11 877	50 278	62 943	54 802	50 806	83 672	0.68
DaimlerChrysler	1 427 555	1 693 535	1 718 583	1 694 121	1 705 657	1 809 342	1 960 110	1 783 634	14.40
Diamond Star/Mitsubishi	136 022	169 829	218 161	192 961	189 086	157 139	159 702	222 036	1.79
Ford	3 294 217	3 655 762	3 371 424	3 474 706	3 458 342	3 449 023	3 638 879	3 683 008	29.74
GM	4 040 453	4 403 909	4 222 624	3 994 720	4 233 144	3 863 421	4 436 252	4 189 673	33.84
Honda	403 775	498 710	552 995	634 374	648 268	694 703	686 043	677 090	5.47
Mercedes Benz	0	0	84	766	20 205	69 526	78 507	80 591	0.65
Nissan	386 973	444 608	465 786	414 031	398 308	308 837	324 645	377 275	3.05
NUMMI (GM/Toyota)	321 428	363 040	352 675	365 469	357 809	361 859	367 121	344 076	2.78
Subaru-Isuzu	126 558	153 883	180 174	194 871	186 891	216 198	192 200	208 676	1.69
Toyota	234 060	275 678	381 445	385 657	431 811	476 203	533 702	625 154	5.05
Total Production	10 590 137	11 906 343	11 625 390	11 531 395	11 792 858	11 628 321	12 593 110	12 382 316	100.00

Source: Ward's AutoInfoBank

Table 2.9

Mexico Light Vehicle Production by Company
(Units)

	1993	1994	1995	1996	1997	1998	1999	2000	% Market Share	2000
BMW	0	0	245	487	970	1 932	1 596	1 594	0.09	0.09
DaimlerChrysler	222 609	238 888	205 192	360 333	352 847	361 802	332 786	408 372	21.86	21.86
Ford	208 530	226 329	213 531	188 228	221 523	186 002	177 205	264 784	14.17	14.17
GM	192 279	161 094	198 407	266 012	299 485	314 516	327 526	435 511	23.31	23.31
Honda	0	0	135	1 194	3 045	7 194	10 241	18 801	1.01	1.01
Mercedes Benz	0	590	814	1 043	955	722	190	0	0.00	0.00
Nissan	185 922	193 591	106 794	135 637	172 763	189 787	185 574	313 496	16.78	16.78
Porsche	0	0	0	32	20	13	9	0	0.00	0.00
Volkswagen	239 003	256 317	191 438	231 078	257 366	338 959	410 308	425 703	22.79	22.79
Total Production	1 048 343	1 076 809	916 556	1 184 044	1 308 974	1 400 927	1 445 435	1 868 261	100.00	100.00

**Total North American Light Vehicle Production by Company
(Units)**

Table 2.10

	1993	1994	1995	1996	1997	1998	1999	2000	% Market Share	2000
Auto Alliance (Ford/Mazda)	219 096	247 004	149 562	129 441	100 394	167 268	165 143	107 431		0.63
BMW	0	385	12 122	50 765	63 913	56 734	52 402	85 266		0.50
CAMI (GM/Suzuki)	159 399	170 231	183 510	124 100	99 770	45 063	112 314	107 651		0.63
DaimlerChrysler	2 293 535	2 628 053	2 461 872	2 759 900	2 685 661	2 909 465	3 089 623	2 896 087		16.87
Diamond Star/Mitsubishi	136 022	169 829	218 161	192 961	189 086	157 139	159 702	222 036		1.29
Ford	3 956 912	4 376 920	4 118 398	4 200 016	4 310 694	4 262 409	4 501 619	4 577 438		26.67
GM	4 980 203	5 288 906	5 328 864	5 013 103	5 427 603	4 928 844	5 679 285	5 588 593		32.56
Honda	504 396	607 018	659 263	780 050	816 494	881 694	971 192	1 022 714		5.96
Hyundai	14 585	0	0	0	0	0	0	0		0.00
Mercedes Benz	0	590	898	1 809	21 160	70 248	78 697	80 591		0.47
Nissan	572 895	638 199	572 580	549 668	571 071	498 624	510 219	690 771		4.02
NUMMI (GM/Toyota)	321 428	363 040	352 675	365 469	357 809	361 859	367 121	344 076		2.00
Porsche	0	0	0	32	20	13	9	0		0.00
Subaru-Isuzu	126 558	153 883	180 174	194 871	186 891	216 198	192 200	208 676		1.22
Toyota	313 279	361 549	471 581	483 001	540 763	647 942	744 784	808 893		4.71
Volkswagen	239 003	256 317	191 438	231 078	257 366	338 959	410 308	425 703		2.48
Volvo	5 504	6 436	7 588	7 127	6 548	8 373	0	0		0.00
Total Production	13 842 815	15 268 360	14 908 686	15 083 391	15 635 243	15 550 832	17 034 618	17 165 926		100.00

Source: Ward's AutoInfoBank and Automotive Reports

Table 2.11

Cost of Materials* in the Canadian Automotive Industry (Millions of Dollars)

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Light vehicles	35 534	36 759	40 231	51 955	60 301	61 994	57 388	47 983	51 700	59 186
Medium and Heavy duty trucks	1 253	1 018	1 184	1 849	2 650	3 392	2 989	4 089	5 162	7 762
Total Motor Vehicles	36 787	37 777	41 415	53 804	62 951	65 386	60 377	52 072	56 862	66 948
Motor Vehicle Body	446	368	252	305	372	414	466	550	677	1 058
Truck Trailer Manufacturing	335	234	166	218	333	512	522	606	665	705
Motor Home, Travel and Camper	178	119	161	185	229	272	267	306	388	412
Total Motor Vehicle Body and Trailer	959	721	579	708	934	1 198	1 255	1 462	1 730	2 175
Automotive Stampings	1 054	1 151	1 474	1 573	1 777	2 105	2 122	2 174	2 267	2 716
Electrical Systems	342	280	312	384	511	615	599	766	772	786
Engines and Assemblies	1 746	950	1 225	1 630	2 040	1 846	2 322	2 460	2 649	3 118
Motor Vehicles Trans. & Power Train	608	949	970	1 117	1 244	1 391	1 448	2 131	2 257	2 814
Plastic Parts	532	481	547	733	944	976	877	1 269	1 316	1 567
Seating and Interior Trim	1 157	1 102	1 208	1 321	1 841	2 174	2 258	2 867	3 012	3 445
Steering and Suspension Comp.	371	283	333	438	620	675	659	710	832	720
Wheel and Brake Systems	427	371	445	503	600	640	692	790	963	985
Other Parts and Accessories	1 636	1 538	1 634	1 508	2 063	2 252	2 285	2 222	2 210	2 340
Total Parts and components	7 873	7 105	8 148	9 207	11 640	12 674	13 262	15 389	16 278	18 491
Total Industry	45 619	45 603	50 142	63 719	75 525	79 258	74 894	68 923	74 870	87 614

* Represents cost of items used in the manufacturing process

NOTE: All calculations are based on North American Industrial Classification System (NAICS)

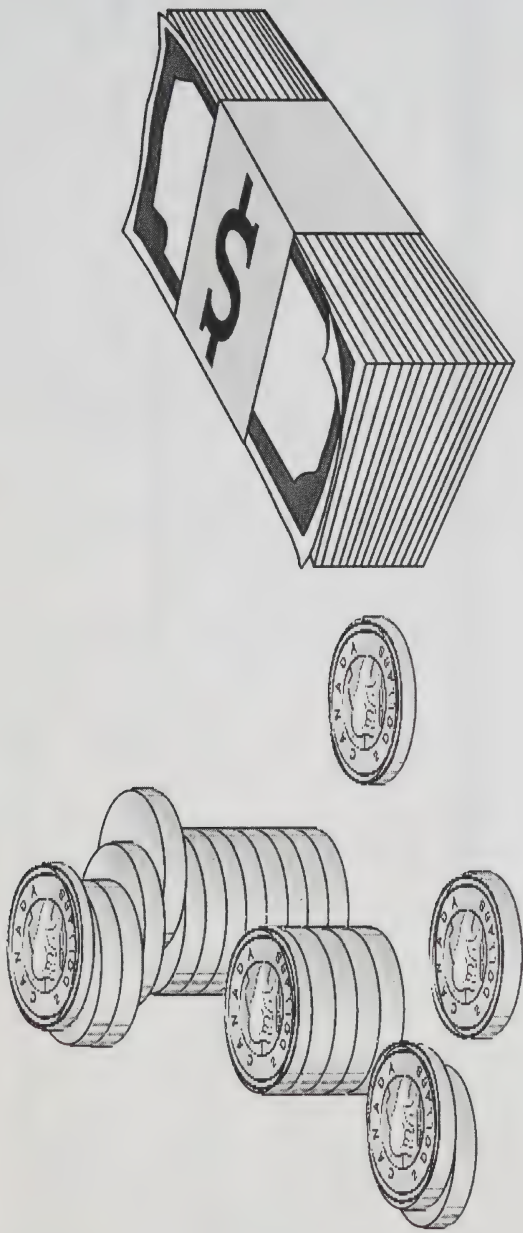
Source: Statistics Canada Catalogue Number 42-251B and 31-203-XPB

**Manufacturing Value Added in the Canadian Automobile Industry
(Millions of Dollars)**

Table 2.12

	1991	1992	1993	1994	1995	1996	1997	1998	1999
Light vehicles	3 624	4 595	5 252	6 964	7 538	8 997	10 001	11 275	19 969
Medium and Heavy duty trucks	416	364	765	1 005	1 184	789	871	1 187	1 945
Total Motor Vehicles	4 040	4 959	6 017	7 969	8 722	9 786	10 872	12 462	21 914
Motor vehicle body	216	220	263	272	345	440	492	520	842
Truck trailer manufacturing	143	107	129	225	278	281	295	381	367
Motor home, travel trailer and camper	70	83	102	122	132	139	191	189	234
Total Motor Vehicle Body and Trailer	429	410	494	619	755	860	978	1 090	1 443
Brake systems	350	424	509	589	642	625	703	831	796
Electrical and electronic equipment	274	281	357	488	417	510	592	681	597
Engines and parts	667	603	1 042	1 103	1 465	2 036	2 303	2 943	2 584
Metal stampings	758	873	1 216	1 375	1 562	1 533	1 657	1 520	1 875
Plastic parts	421	478	643	783	768	863	1 039	1 089	1 295
Seating and interior trim	687	696	712	987	1 066	1 182	1 315	1 388	1 535
Steering and suspension components	249	304	378	434	501	536	606	685	744
Transmission and power train parts	824	855	827	688	860	891	1 285	1 394	1 727
Other motor vehicle parts	1 132	1 290	1 331	1 477	1 683	1 638	1 766	1 910	2 072
Total Parts and components	5 362	5 804	7 015	7 924	8 964	9 814	11 266	12 441	13 225
Total Industry	9 831	11 173	13 526	16 512	18 441	20 460	23 116	25 993	36 582

NOTE: All calculations are based on North American Industrial Classification System (NAICS)



Investment/Research and Development/Exchange Rates/Prices/GDP

New Capital Expenditures in Canadian Automotive Industries
(Millions of Dollars)

Table 3.1

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Motor Vehicle Manufacturers (NAICS 3361)	1 221	1 247	1 581	1 378	1 606	2 539	3 056	2 593	2 495	1 738
Truck Body Manufacturers (NAICS 3362)	19	10	20	62	80	77	91	36	74	65
Motor Vehicle Parts and Accessories Manufacturers (NAICS 3363)	514	458	630	1 779	1 583	767	996	1 389	755	838
Automotive Dealers (NAICS 441)	470	670	484	692	636	608	720	427	270	318
Total	2 224	2 385	2 715	3 911	3 905	3 991	4 863	4 445	3 594	2 959

Source: Statistics Canada catalogue Number 61-205-XPB

Table 3.2

Research and Development in the Motor Vehicle Industries (SIC 323, 324 and 325)

	1985	1990	1991	1992	1993	1994	1995	1996	1997*	1998*	1999**
Number of R&D Performers	39	46	39	50	53	153	143	131	98	103	94
Total R&D Personnel (Person Years)	1 050	895	860	865	975	1 534	1 478	1 463	1 338	1 480	1 278
Total R&D Expenditures (Millions of Dollars)	78	69	77	83	125	212	185	170	197	183	196
R&D Expenditures as Percentage of Shipments	0.19	0.16	0.19	0.18	0.22	0.29	0.21	0.23	0.24	0.21	0.18

* Revised figures

R&D data for 1991 has been revised due to reclassification of the largest category of R&D performer. Starting in 1996, data may be incomplete due to new methodology adopted by Statistics Canada.

** Preliminary

Exchange Rates
(Canadian dollars)

	1975	1980	1985	1990	1995	1996	1997	1998	1999	2000
U.S. Dollar	1.017	1.169	1.366	1.167	1.372	1.364	1.385	1.484	1.486	1.485
British Pound	2.259	2.720	1.771	2.082	2.166	2.130	2.268	2.459	2.404	2.250
French Franc	0.238	0.277	0.153	0.215	0.275	0.267	0.237	0.252	0.242	0.209
German Mark	0.414	0.644	0.468	0.724	0.959	0.907	0.799	0.845	0.811	0.701
Japanese Yen (000)	3.430	5.190	5.770	8.100	14.680	12.540	11.450	11.400	13.110	13.780

Source: Statistics Canada, Canadian Economic Observer, Catalogue Numbers 11-210-XPB and 11-010-XPB

Table 3.4

Average Prices of Passenger Cars
(\$ Canadian)

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
North American	15 290	16 339	16 876	15 766	16 785	17 459	18 478	20 009	21 066	21 937	22 181	22 612	23 537
Japan	15 522	16 228	16 761	15 940	17 128	18 139	18 110	20 875	23 345	22 921	21 474	21 808	22 735
Other Countries	21 013	22 114	22 390	20 519	20 513	22 389	27 136	29 036	33 025	35 259	35 518	33 680	32 255
Total all Countries	17 275	18 227	18 676	17 408	18 142	19 329	21 241	23 307	25 812	26 706	26 391	26 033	26 176

Gross Domestic Product (1992 Factor Cost)

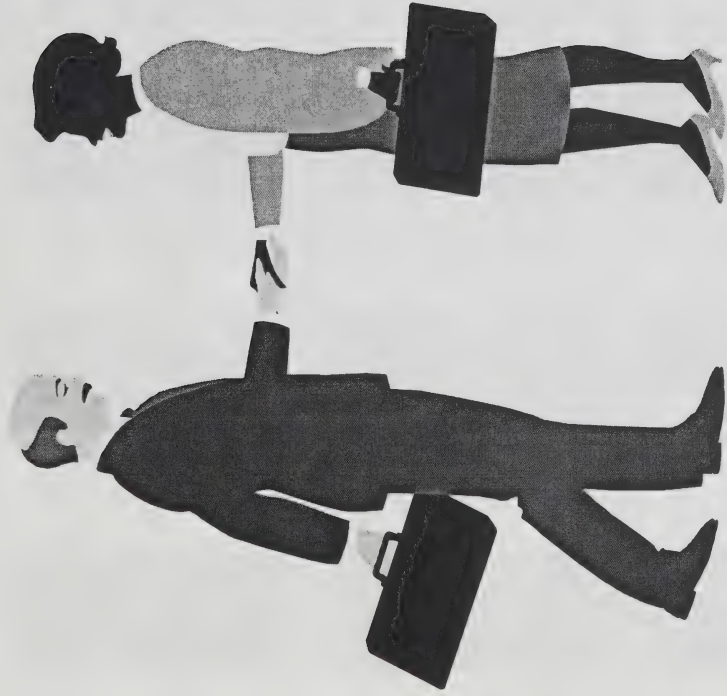
Table 3.5

(\$ Millions)

	1994	1995	1996	1997	1998	1999	2000
Total Industry	645 957	663 082	672 799	700 039	721 879	753 047	786 725
Manufacturing Industries	108 859	114 239	115 659	122 320	127 335	135 419	143 200
Motor Vehicle Industry	5 855	6 103	5 644	6 005	6 246	7 744	7 650
Truck and bus body and trailer industries	585	682	723	836	929	992	945
Motor vehicle engine and engine parts	633	630	877	1 033	1 144	1 323	1 268
Motor vehicle wiring assemblies	473	423	425	410	393	360	369
Motor vehicle stampings	1 200	1 427	1 486	1 637	1 802	2 140	2 129
Motor vehicle steering and suspension parts	547	610	655	714	825	822	799
Motor vehicle wheel and brakes	473	485	444	513	557	605	568
Plastic parts and accessories	748	884	944	1 106	1 093	1 270	1 384
Motor vehicle fabric accessories	640	722	767	831	846	945	897
Other motor vehicle parts and accessories	2 328	2 542	2 596	3 222	3 232	3 807	4 111
Motor vehicle parts and accessories industries	7 042	7 723	8 194	9 466	9 892	11 272	11 525
Total Automotive Industry	13 482	14 508	14 561	16 307	17 067	20 008	20 120
<i>Percent of Manufacturing GDP</i>	<i>12.38</i>	<i>12.70</i>	<i>12.59</i>	<i>13.33</i>	<i>13.40</i>	<i>14.77</i>	<i>14.05</i>
<i>Percent of Total Industry GDP</i>	<i>2.09</i>	<i>2.19</i>	<i>2.16</i>	<i>2.33</i>	<i>2.36</i>	<i>2.66</i>	<i>2.56</i>

NOTE: All calculations are based on Standard Industrial Classification (SIC) code

Source: Statistics Canada, Catalogue Number 15-001-XPB

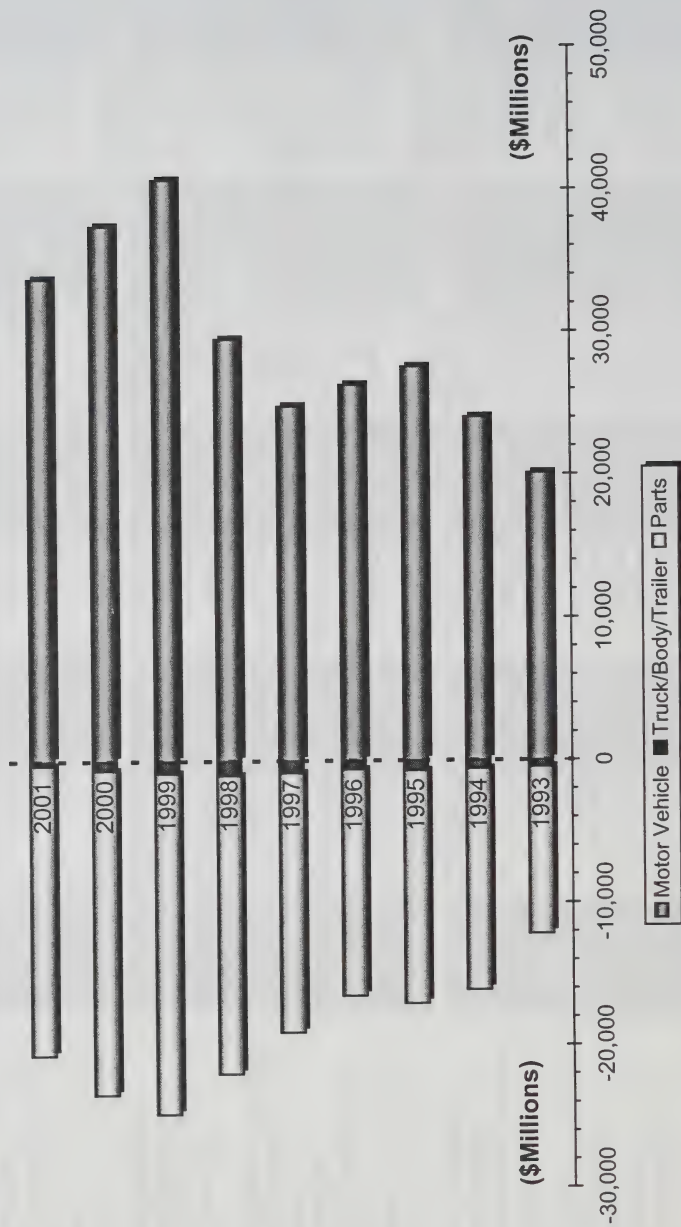


Trade Data

	1993	1994	1995	1996	1997	1998	1999	2000	2001
Canadian Exports									
Motor Vehicle	35 491 711	42 864 242	46 165 148	45 400 015	49 308 181	54 696 092	68 767 738	67 505 593	63 413 249
Truck/Body/Trailer Manufacturing	363 285	371 958	420 819	461 987	551 121	734 098	928 877	1 104 076	1 127 735
Automotive Stampings	1 996 859	2 416 010	2 375 278	2 496 849	2 672 940	2 700 571	3 111 978	3 440 981	3 328 844
Electrical Systems	218 217	271 207	249 158	273 748	291 462	353 485	379 803	408 041	433 229
Engines and Assemblies	2 320 648	2 495 055	2 351 633	3 329 488	3 714 773	4 533 037	5 493 825	5 541 416	4 984 578
Motor Vehicle Trans. & Power Train	1 572 683	1 435 823	1 760 836	1 445 493	1 964 611	2 395 972	3 269 366	3 315 741	3 163 357
Plastic Part	728 436	986 739	1 093 749	1 302 603	1 583 125	1 633 774	1 875 654	2 210 966	2 025 466
Seating and Interior Trim	532 100	1 017 658	974 332	1 068 823	1 199 879	1 385 913	1 346 948	1 462 270	1 346 863
Steering and Suspension Component	590 881	705 710	716 464	663 237	625 278	596 968	685 652	716 030	709 499
Wheel and Brake Systems	1 044 816	1 090 183	1 167 843	1 181 447	1 241 275	1 478 660	1 516 362	1 333 941	1 254 378
Other Parts and Accessories	2 269 228	2 639 870	2 618 612	2 620 340	2 679 374	2 780 591	3 072 755	3 264 469	3 209 385
Total Exports	47 128 864	56 294 455	59 893 872	60 244 030	65 832 025	73 289 161	90 448 958	90 303 524	84 996 583
Canadian Imports									
Motor Vehicle	15 402 737	18 835 544	18 593 402	19 084 392	24 490 954	25 165 055	28 047 330	30 035 336	29 638 235
Truck/Body/Trailer Manufacturing	826 331	948 198	1 122 580	1 065 384	1 384 864	1 758 823	1 792 415	1 754 796	1 419 233
Automotive Stampings	1 825 953	1 770 721	2 223 966	2 143 981	2 398 253	2 204 357	2 370 617	2 315 647	2 122 117
Electrical Systems	2 052 632	2 557 586	2 600 035	2 681 291	2 998 467	3 266 198	3 707 551	3 644 741	3 269 835
Engines and Assemblies	4 679 425	5 711 494	5 893 820	6 498 653	7 217 408	8 753 342	10 702 131	10 811 634	9 538 122
Motor Vehicle Trans. & Power Train	4 180 331	4 968 390	5 269 664	5 148 712	6 203 116	6 971 381	7 906 977	7 506 221	6 832 097
Plastic Part	67 843	134 339	144 223	138 238	165 573	197 148	240 698	234 138	217 644
Seating and Interior Trim	988 826	1 213 140	807 662	845 072	945 786	952 397	1 039 878	1 111 019	1 205 815
Steering and Suspension Component	1 813 140	2 081 422	2 175 199	2 097 585	2 488 779	2 849 222	3 313 074	3 332 416	3 060 941
Wheel and Brake Systems	1 279 635	1 557 561	1 619 264	1 662 016	1 915 972	2 020 662	2 205 496	2 022 989	1 909 768
Other Parts and Accessories	6 096 387	8 581 419	8 912 430	9 042 833	9 858 922	11 579 539	13 173 903	13 467 104	12 619 332
Total Imports	39 213 240	48 359 814	49 362 245	50 408 157	60 068 094	65 718 124	74 500 070	76 236 041	71 833 135
Trade Balances									
Motor Vehicle	20 088 974	24 028 698	27 571 746	26 315 623	24 817 227	29 531 037	40 720 408	37 470 257	33 775 014
Truck/Body/Trailer Manufacturing	- 463 046	- 576 240	- 701 761	- 603 337	- 833 743	- 1 024 725	- 863 538	- 650 720	- 291 498
Automotive Stampings	170 906	645 289	151 312	352 868	274 687	496 214	741 361	1 125 334	1 206 731
Electrical Systems	- 1 834 415	- 2 286 379	- 2 350 877	- 2 407 543	- 2 707 005	- 2 912 713	- 3 327 748	- 3 236 700	- 2 836 606
Engines and Assemblies	- 2 358 777	- 3 216 439	- 3 542 187	- 3 169 165	- 3 502 635	- 4 200 305	- 5 208 306	- 5 270 218	- 4 553 544
Motor Vehicle Trans. & Power Train	- 2 607 648	- 3 532 567	- 3 508 828	- 3 703 219	- 4 238 499	- 4 575 409	- 4 637 611	- 4 190 480	- 3 668 740
Plastic Part	660 593	852 400	949 526	1 164 365	1 417 552	1 436 626	1 634 956	1 976 828	1 807 822
Seating and Interior Trim	- 456 726	- 195 482	166 670	223 751	254 093	433 516	307 070	351 251	141 048
Steering and Suspension Component	- 1 222 259	- 1 375 712	- 1 458 735	- 1 430 348	- 1 863 501	- 2 252 254	- 2 627 422	- 2 616 386	- 2 351 442
Wheel and Brake Systems	- 234 819	- 467 378	- 451 421	- 480 569	- 674 697	- 542 002	- 689 134	- 689 048	- 655 390
Other Parts and Accessories	- 3 827 159	- 5 941 549	- 6 293 818	- 6 422 493	- 7 179 548	- 8 798 948	- 10 101 148	- 10 202 635	- 9 409 947
Total Trade Balances	7 915 624	7 934 641	10 531 627	9 835 873	5 763 931	7 571 037	15 948 888	14 067 483	13 163 448

NOTE: All calculations are based on North American Industry Classification System (NAICS)

Source: Statistics Canada Trade Data Online



	1993	1994	1995	1996	1997	1998	1999	2000	2001
Canadian Exports									
Motor Vehicle	34 971 575	42 221 051	45 166 159	44 774 914	48 765 470	54 235 843	68 128 454	66 896 838	62 938 946
Truck/Body/Trailer Manufacturing	331 627	340 917	389 149	430 227	516 838	699 051	897 776	1 076 411	1 086 037
Automotive Stampings	1 760 625	2 145 604	2 032 261	2 244 939	2 349 229	2 476 491	2 922 584	3 124 461	3 050 623
Electrical Systems	198 421	241 949	228 299	249 037	272 176	330 079	358 894	387 601	408 337
Engines and Assemblies	2 261 166	2 430 528	2 243 829	3 232 953	3 630 082	4 460 365	5 408 205	5 740 992	4 740 597
Motor Vehicle Trans. & Power Train	1 450 396	1 339 087	1 522 072	1 271 720	1 689 304	2 273 650	3 055 810	3 024 014	2 923 319
Plastic Part	563 088	798 857	890 860	1 176 230	1 305 548	1 441 981	1 727 689	1 906 529	1 777 010
Seating and Interior Trim	445 635	914 369	867 275	1 004 895	1 058 829	1 276 659	1 221 667	1 251 101	1 171 994
Steering and Suspension Component	550 085	659 532	650 913	610 392	584 138	567 068	655 653	682 018	672 095
Wheel and Brake Systems	1 030 304	1 069 015	1 148 518	1 162 825	1 218 625	1 452 910	1 485 811	1 307 506	1 229 734
Other Parts and Accessories	2 004 733	2 357 282	2 244 179	2 300 129	2 350 578	2 527 055	2 863 401	3 001 045	2 977 552
Total Exports	45 567 655	54 518 191	57 383 514	58 458 261	63 740 817	71 741 152	88 725 944	88 076 516	82 976 244
Canadian Imports									
Motor Vehicle	11 281 172	14 971 691	14 735 272	15 172 131	18 907 507	19 379 448	20 963 186	21 243 493	19 891 301
Truck/Body/Trailer Manufacturing	779 087	893 252	1 069 398	1 016 416	1 335 356	1 669 078	1 729 262	1 672 954	1 342 414
Automotive Stampings	1 638 311	1 693 129	2 188 065	2 111 813	2 372 946	2 173 217	2 338 556	2 281 148	2 089 897
Electrical Systems	1 728 127	2 061 719	1 965 363	1 887 593	2 018 670	2 083 482	2 436 371	2 345 907	2 231 305
Engines and Assemblies	3 690 953	4 394 666	4 620 533	5 181 556	6 079 382	7 975 170	9 429 316	9 584 207	8 647 770
Motor Vehicle Trans. & Power Train	3 657 988	4 403 781	4 680 757	4 593 358	5 682 697	6 319 324	7 082 918	6 720 589	6 188 682
Plastic Part	50 591	101 662	108 755	108 314	138 067	175 830	222 478	210 078	194 421
Seating and Interior Trim	626 801	804 278	631 144	683 967	780 536	722 719	787 712	784 835	790 378
Steering and Suspension Component	1 613 584	1 847 559	1 949 162	1 910 322	2 294 498	2 611 717	3 037 864	3 058 277	2 787 764
Wheel and Brake Systems	1 110 706	1 373 756	1 422 107	1 464 706	1 686 857	1 804 291	1 955 832	1 756 488	1 630 314
Other Parts and Accessories	5 295 745	7 452 180	7 921 797	8 240 555	9 000 544	10 326 010	11 930 444	12 062 238	11 271 608
Total Imports	31 473 065	39 967 673	41 292 373	42 370 731	50 297 060	55 240 286	61 913 939	61 720 214	57 065 854
Trade Balances									
Motor Vehicle	23 690 403	27 249 360	30 430 887	29 602 783	29 857 963	34 856 395	47 165 268	45 653 345	43 047 645
Truck/Body/Trailer Manufacturing	-447 460	-552 335	-680 249	-586 189	-818 518	-970 027	-831 486	-596 543	-256 377
Automotive Stampings	122 314	482 475	-155 804	133 126	-23 717	303 274	584 028	843 313	980 726
Electrical Systems	-1 529 706	-1 819 770	-1 737 084	-1 638 556	-1 746 494	-1 753 403	-2 077 477	-1 958 306	-1 822 968
Engines and Assemblies	-1 429 787	-1 964 138	-2 376 704	-1 948 603	-2 449 300	-3 514 805	-4 021 111	-4 165 215	-3 907 173
Motor Vehicle Trans. & Power Train	-2 207 592	-3 064 694	-3 158 685	-3 321 638	-3 993 393	-4 045 674	-4 027 108	-3 696 575	-3 265 363
Plastic Part	512 497	697 195	782 105	1 067 916	1 167 481	1 266 151	1 505 211	1 696 451	1 582 589
Seating and Interior Trim	-181 166	110 091	236 131	320 928	278 293	553 940	433 955	466 266	381 616
Steering and Suspension Component	-1 063 499	-1 188 027	-1 298 249	-1 299 930	-1 710 360	-2 044 649	-2 382 221	-2 376 259	-2 115 669
Wheel and Brake Systems	-80 402	-304 741	-273 589	-301 881	-468 232	-351 381	-470 021	-448 982	-400 580
Other Parts and Accessories	-3 291 012	-5 094 898	-5 677 618	-5 940 426	-6 649 966	-7 798 955	-9 067 043	-9 061 193	-8 294 056
Total Trade Balances	14 094 590	14 550 518	16 091 141	16 087 530	13 443 757	16 500 866	26 812 005	26 356 302	25 910 390

NOTE: All calculations are based on North American Industry Classification System (NAICS)

Source: Statistics Canada Trade Data Online

Canada-Mexico Trade in Automotive Products

Table 4.3

(Thousands of Dollars)

	1993	1994	1995	1996	1997	1998	1999	2000	2001
Canadian Exports									
Motor Vehicle	4 970	61 407	43 583	64 265	36 726	20 138	81 627	112 588	118 034
Truck/Body/Trailer Manufacturing	360	286	41	200	13	149	37	178	273
Automotive Stampings	27 264	22 984	38 202	35 849	32 201	33 275	32 082	41 291	48 112
Electrical Systems	862	483	388	126	74	354	326	391	1 179
Engines and Assemblies	11 978	14 812	44 798	41 020	47 280	41 791	48 063	55 563	92 911
Motor Vehicle Trans. & Power Train	43 143	8 954	45 212	53 677	67 303	59 769	83 760	127 319	129 254
Plastic Part	15 752	12 264	12 919	13 366	7 502	9 494	8 998	10 197	14 418
Seating and Interior Trim	10 665	9 683	9 092	6 054	4 276	13 222	50 108	58 355	51 454
Steering and Suspension Component	4 732	4 994	8 870	7 141	8 635	8 976	8 693	11 447	13 078
Wheel and Brake Systems	2 081	6 246	2 614	3 165	5 401	11 221	19 513	15 396	12 757
Other Parts and Accessories	23 434	19 644	53 507	57 005	69 115	61 392	65 192	89 842	86 126
Total Exports	145 241	161 757	259 226	281 868	278 526	259 781	398 399	522 567	567 596
Canadian Imports									
Motor Vehicle	962 186	1 159 075	1 568 463	1 669 416	1 744 300	1 401 094	1 672 299	2 730 478	2 910 902
Truck/Body/Trailer Manufacturing	615	4 374	5 207	3 054	3 827	30 835	17 881	28 749	17 739
Automotive Stampings	143 813	64 686	5 185	5 403	2 505	2 591	2 490	5 098	5 122
Electrical Systems	181 234	288 319	435 755	559 454	735 381	902 832	911 580	866 897	703 604
Engines and Assemblies	238 031	360 024	317 434	365 900	274 608	209 907	426 901	454 855	276 605
Motor Vehicle Trans. & Power Train	106 768	56 460	3 083	3 308	6 851	25 878	44 756	47 296	34 527
Plastic Part	1 702	3 760	12 331	12 270	10 181	7 346	1 095	1 479	1 762
Seating and Interior Trim	320 654	369 981	119 353	110 396	132 927	204 665	222 297	282 446	379 826
Steering and Suspension Component	38 393	37 206	36 996	32 785	37 017	48 472	55 166	50 792	45 073
Wheel and Brake Systems	23 362	26 554	30 090	43 425	60 652	53 757	56 477	59 413	55 875
Other Parts and Accessories	195 441	334 277	244 625	166 360	201 931	326 354	419 767	405 338	390 623
Total Imports	2 212 199	2 704 716	2 778 522	2 971 771	3 210 180	3 213 731	3 830 709	4 932 841	4 821 658
Trade Balances									
Motor Vehicle	- 957 216	- 1 097 668	- 1 524 880	- 1 605 151	- 1 707 574	- 1 380 956	- 1 590 672	- 2 617 890	- 2 792 868
Truck/Body/Trailer Manufacturing	- 255	- 4 088	- 5 166	- 2 854	- 3 814	- 30 686	- 17 844	- 28 571	- 17 466
Automotive Stampings	- 116 549	- 41 702	33 017	30 446	29 696	30 684	29 592	36 193	42 990
Electrical Systems	- 180 372	- 287 836	- 435 367	- 559 328	- 735 307	- 902 478	- 911 254	- 866 506	- 702 425
Engines and Assemblies	- 226 063	- 345 212	- 272 636	- 324 880	- 227 328	- 168 116	- 378 838	- 399 292	- 183 694
Motor Vehicle Trans. & Power Train	- 63 625	- 47 506	42 129	50 369	60 452	33 891	39 004	80 023	94 727
Plastic Part	- 14 050	8 504	588	1 096	- 2 679	2 148	7 903	8 718	12 656
Seating and Interior Trim	- 309 989	- 360 298	- 110 261	- 104 342	- 128 651	- 191 443	- 172 189	- 224 091	- 328 372
Steering and Suspension Component	- 33 661	- 32 212	- 28 126	- 25 644	- 28 382	- 39 496	- 46 473	- 39 345	- 31 995
Wheel and Brake Systems	- 21 281	- 20 308	- 27 476	- 40 260	- 55 251	- 42 536	- 36 964	- 44 017	- 43 118
Other Parts and Accessories	- 172 007	- 314 633	- 191 118	- 109 355	- 132 816	- 264 962	- 354 575	- 315 496	- 304 497
Total Trade Balances	- 2 066 958	- 2 542 959	- 2 519 296	- 2 689 903	- 2 931 654	- 2 953 950	- 3 432 310	- 4 410 274	- 4 254 062

NOTE: All calculations are based on North American Industry Classification System (NAICS)

	1993	1994	1995	1996	1997	1998	1999	2000	2001
Canadian Exports									
Motor Vehicle	31 952	56 967	128 287	107 066	65 479	52 893	149 616	144 006	119 217
Truck/Body/Trailer Manufacturing	4 802	7 882	10 173	7 722	6 572	5 243	1 433	1 961	1 400
Automotive Stampings	3 339	3 059	2 096	1 443	4 800	3 269	2 144	2 051	2 232
Electrical Systems	335	588	509	1 724	592	335	795	915	1 100
Engines and Assemblies	2 241	1 484	876	827	1 541	818	631	794	752
Motor Vehicle Trans. & Power Train	1 052	581	1 070	931	1 653	2 838	1 100	1 154	2 020
Plastic Part	2 574	2 926	772	580	2 213	1 045	700	736	457
Seating and Interior Trim	1 769	6 252	1 797	633	574	350	365	437	672
Steering and Suspension Component	465	287	518	333	871	754	493	639	639
Wheel and Brake Systems	111	107	95	520	1 456	754	1 066	730	313
Other Parts and Accessories	39 797	42 610	24 320	31 743	33 906	20 154	10 113	4 599	4 014
Total Exports	88 437	122 743	170 513	153 522	119 657	88 453	168 456	157 822	132 816
Canadian Imports									
Motor Vehicle	2 445 218	1 699 070	1 405 073	1 267 092	2 561 275	2 695 552	3 120 233	3 420 042	3 670 190
Truck/Body/Trailer Manufacturing	2 818	1 679	2 166	2 499	3 170	3 922	9 011	7 151	5 430
Automotive Stampings	19 955	24 741	23 677	17 322	14 184	13 891	16 554	15 339	12 078
Electrical Systems	73 816	71 823	81 298	90 814	69 215	69 819	75 100	106 746	115 467
Engines and Assemblies	630 639	812 719	775 266	776 526	674 501	378 960	640 117	482 054	305 473
Motor Vehicle Trans. & Power Train	305 445	383 165	460 817	360 378	335 380	427 576	603 304	590 004	447 603
Plastic Part	3 315	5 968	7 393	4 171	3 604	2 901	3 802	5 505	4 185
Seating and Interior Trim	26 706	23 584	35 866	21 749	11 357	7 668	17 876	27 559	18 025
Steering and Suspension Component	87 655	80 574	90 673	66 433	58 391	76 028	93 133	106 882	116 239
Wheel and Brake Systems	56 801	63 963	69 514	42 659	38 874	36 730	60 601	54 072	63 952
Other Parts and Accessories	330 241	409 017	377 604	262 399	232 485	433 288	325 810	474 833	411 037
Total Imports	3 982 609	3 576 303	3 329 347	2 912 042	4 002 436	4 146 335	4 965 541	5 290 187	5 169 679
Trade Balances									
Motor Vehicle	-2 413 266	-1 642 103	-1 276 786	-1 160 026	-2 495 796	-2 642 659	-2 970 617	-3 276 036	-3 550 973
Truck/Body/Trailer Manufacturing	1 984	6 203	8 007	5 223	3 402	1 321	-7 578	-5 190	-4 030
Automotive Stampings	-16 616	-21 682	-21 581	-15 879	-9 384	-10 622	-14 410	-13 288	-9 846
Electrical Systems	-73 481	-71 235	-80 789	-89 090	-88 623	-69 484	-74 305	-105 831	-114 367
Engines and Assemblies	-628 398	-811 235	-774 390	-775 699	-672 960	-378 142	-639 486	-481 260	-304 721
Motor Vehicle Trans. & Power Train	-304 393	-382 584	-359 308	-334 449	-425 923	-600 466	-588 904	-588 850	-445 583
Plastic Part	-741	-3 042	-6 621	-3 591	-1 391	-1 856	-3 102	-4 769	-3 728
Seating and Interior Trim	-24 937	-17 332	-34 069	-21 116	-10 783	-7 318	-17 511	-27 122	-17 353
Steering and Suspension Component	401	-87 368	-80 056	-90 340	-65 562	-57 637	-75 535	-106 443	-115 600
Wheel and Brake Systems	-56 690	-63 856	-69 419	-42 139	-37 418	-35 976	-59 535	-53 342	-63 639
Other Parts and Accessories	-290 444	-366 407	-353 284	-230 656	-198 579	-413 134	-315 697	-470 234	-407 023
Total Trade Balances	-3 894 172	-3 453 560	-3 158 834	-2 758 520	-3 882 779	-4 057 882	-4 797 085	-5 132 365	-5 036 863

NOTE: All calculations are based on North American Industry Classification System (NAICS)

Source: Statistics Canada Trade Data Online

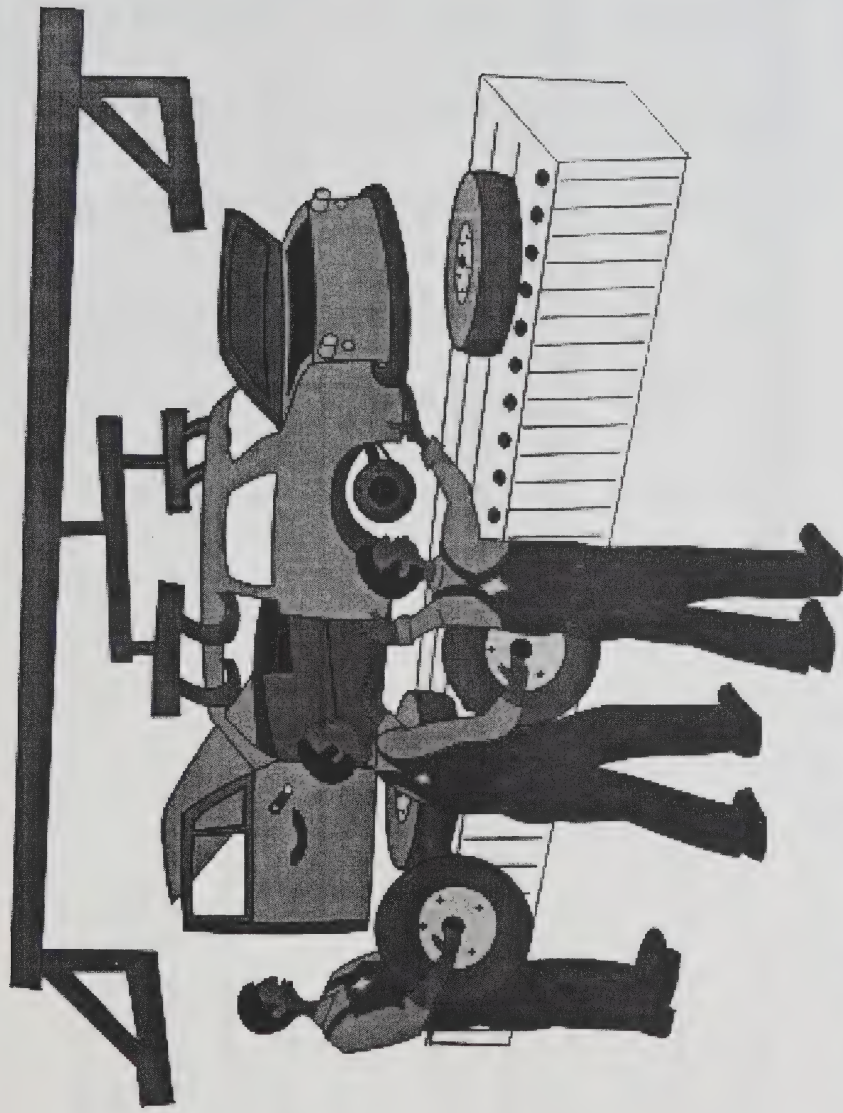
Canadian Trade in Automotive Products (Other Countries)
(Thousands of Dollars)

Table 4.5

	1993	1994	1995	1996	1997	1998	1999	2000	2001
Canadian Exports									
Motor Vehicle	483 214	524 817	827 119	453 770	440 506	387 218	408 041	352 161	237 052
Truck/Body/Trailer Manufacturing	28 496	22 873	21 456	23 838	27 698	29 655	29 631	25 526	40 025
Automotive Stampings	205 631	244 363	302 719	214 618	286 710	187 536	155 168	273 178	227 877
Electrical Systems	18 599	28 187	19 962	19 861	18 200	22 717	19 788	19 134	22 613
Engines and Assemblies	45 263	48 231	62 130	54 688	35 870	30 063	36 926	66 067	150 318
Motor Vehicle Trans. & Power Train	78 092	87 201	192 482	119 165	206 357	59 715	128 696	163 254	108 764
Plastic Part	147 022	172 692	189 198	112 427	267 862	181 254	138 267	293 504	233 581
Seating and Interior Trim	74 031	87 354	96 168	57 241	136 200	95 682	74 808	152 377	122 743
Steering and Suspension Component	35 599	40 897	56 163	45 371	31 634	20 170	20 813	22 126	23 697
Wheel and Brake Systems	12 320	14 815	16 616	14 937	15 793	13 775	9 972	10 309	11 574
Other Parts and Accessories	201 264	220 334	296 806	231 463	225 775	171 990	134 049	168 983	141 693
Total Exports	1 327 531	1 491 764	2 080 619	1 350 379	1 693 025	1 199 775	1 156 159	1 546 619	1 319 927
Canadian Imports									
Motor Vehicle	714 161	1 005 708	884 594	975 753	1 277 872	1 688 961	2 291 612	2 641 323	3 165 842
Truck/Body/Trailer Manufacturing	43 811	48 893	45 809	43 415	42 511	54 988	36 261	45 942	53 650
Automotive Stampings	23 874	18 165	7 039	9 443	8 618	14 658	13 017	14 062	15 016
Electrical Systems	69 455	135 725	117 599	143 430	175 201	210 065	284 500	325 191	219 459
Engines and Assemblies	119 802	144 085	180 587	174 671	188 917	189 305	205 797	290 518	308 274
Motor Vehicle Trans. & Power Train	110 130	124 984	125 007	191 668	178 188	198 603	175 999	148 332	161 285
Plastic Part	12 235	22 949	15 744	13 483	13 721	11 071	13 323	17 076	17 276
Seating and Interior Trim	14 665	15 297	21 289	28 960	20 966	17 345	11 993	16 179	17 586
Steering and Suspension Component	73 508	116 083	98 368	88 045	98 873	113 005	126 911	116 465	111 865
Wheel and Brake Systems	88 766	93 288	97 553	111 226	129 589	125 884	132 586	153 016	159 627
Other Parts and Accessories	274 960	385 945	368 404	373 519	423 962	493 887	497 882	524 695	546 064
Total Imports	1 545 367	2 111 122	1 962 003	2 153 613	2 558 418	3 117 772	3 789 881	4 292 799	4 775 944
Trade Balances									
Motor Vehicle	-230 947	-480 891	-57 475	-521 983	-837 366	-1 301 743	-1 883 571	-2 289 162	-2 928 790
Truck/Body/Trailer Manufacturing	-17 315	-26 020	-24 353	-19 577	-14 813	-25 333	-6 630	-20 416	-13 625
Automotive Stampings	181 757	226 198	295 680	205 175	278 092	172 878	142 151	259 116	212 861
Electrical Systems	-50 856	-107 538	-97 637	-120 569	-156 581	-187 348	-264 712	-306 057	-196 846
Engines and Assemblies	-74 539	-95 854	-118 457	-119 983	-153 047	-159 242	-168 871	-224 451	-157 956
Motor Vehicle Trans. & Power Train	-32 038	-37 783	-67 475	-72 503	-142 318	-138 888	-47 303	-14 922	-52 521
Plastic Part	134 787	149 743	173 454	98 944	192 636	170 183	124 944	276 428	216 305
Seating and Interior Trim	59 366	72 057	74 869	28 281	246 896	78 337	62 815	136 198	105 157
Steering and Suspension Component	-37 909	-75 186	-42 205	-42 674	37 327	-92 835	-106 098	-94 339	-88 178
Wheel and Brake Systems	-76 446	-78 473	-80 937	-96 289	-97 955	-112 109	-122 614	-142 707	-148 053
Other Parts and Accessories	-73 696	-165 611	-71 798	-142 056	-408 169	-321 897	-363 833	-355 712	-404 371
Total Trade Balances	-217 836	-619 358	118 616	-803 234	-865 393	-1 917 997	-2 633 722	-2 746 180	-3 456 017

NOTE: All calculations are based on North American Industry Classification System (NAICS)

Employment



North American Employment Related to Automotive Industries
(Annual Average in Thousands)

Table 5.1

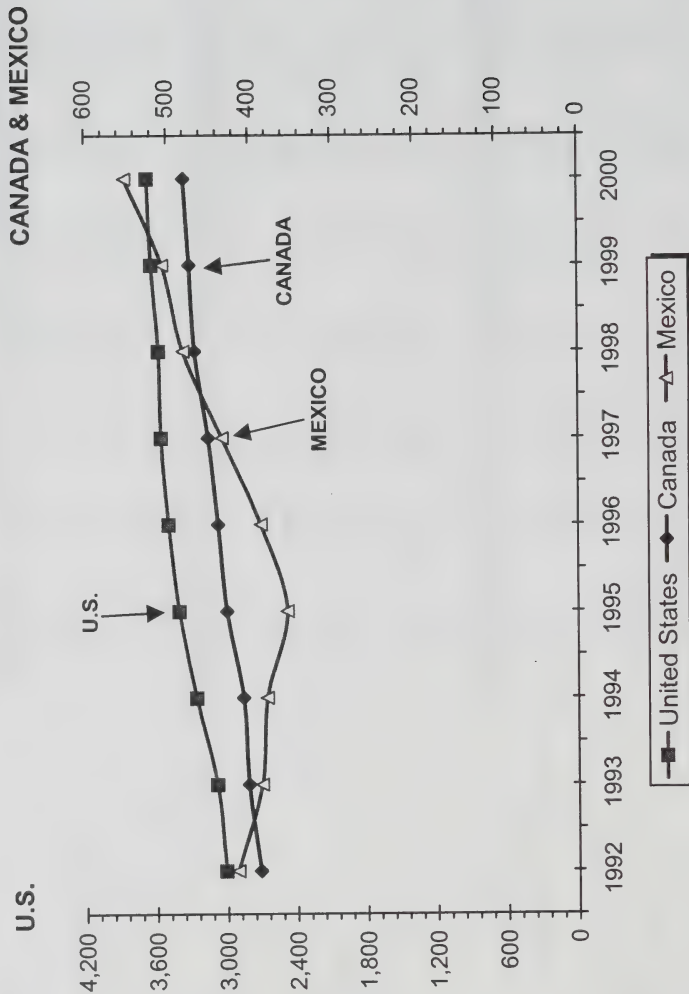
	1992	1993	1994	1995	1996	1997	1998	1999	2000
Canada									
Total Manufacturing	127	133	141	145	152	152	163	168	172
Motor Vehicle Assembly (NAICS 3361)	53	55	56	56	58	55	58	57	56
Truck Bodies and Trailers (NAICS 3362)	11	10	12	12	14	16	18	18	18
Automotive Parts and Accessories (NAICS 3363)*	63	68	73	77	80	81	87	93	98
Total Retail	261	269	267	283	286	298	303	304	307
Automotive Dealers/Distribution (NAICS 415, 441 excl. 4413)	129	130	125	134	136	143	148	149	150
Aftermarket (NAICS 8111, 4413, 415 excl. 4151)**	132	139	142	149	150	155	155	155	157
Total Automotive Industries	388	402	408	428	438	450	466	472	479
United States									
Total Manufacturing	867	889	962	1 028	1 032	1 048	1 051	1 075	1 071
Motor Vehicle Assembly (SIC 3711)	315	320	341	357	346	348	345	353	351
Truck and Bus Bodies (SIC 3713)	34	35	38	39	39	41	43	48	48
Parts and Accessories (SIC 3714)*	420	433	475	516	530	544	547	552	550
Automotive Stamping (SIC 3465)	98	101	108	116	117	115	116	122	122
Total Retail	2 145	2 196	2 294	2 374	2 457	2 500	2 518	2 554	2 592
Automotive Dealers (SIC 551)	875	908	963	996	1 031	1 046	1 047	1 080	1 114
Aftermarket (SIC 501, 554, 7538)**	1 270	1 288	1 331	1 378	1 426	1 454	1 471	1 474	1 478
Total Automotive Industries	3 012	3 085	3 256	3 402	3 489	3 548	3 569	3 629	3 663
Mexico									
Vehicle manufacturers	60	55	50	42	44	49	54	57	60
Components industry	285	258	256	253	280	320	356	377	413
of which Maquiladora components industry***	126	101	103	119	136	159	173	189	190
Dealer network	71	73	74	59	62	64	70	71	78
Total Automotive Industries	416	386	379	354	386	433	480	505	551
Total North American Employment	3 816	3 873	4 043	4 184	4 313	4 431	4 515	4 606	4 693

* Includes aftermarket manufacturing

** Includes wholesale and retail stores, service stations and repair shops

*** Estimate - 2000

Source: Statistics Canada Catalogue Number 42-251B (up to 1986), 31-203 (1986 and subsequent years), and 72-002; U.S. Bureau of Labor Statistics; INEGI, AMDA





Automotive Plants in Canada

Major Motor Vehicle Assembly Plants in Canada

Table 6.1

Company/Plant Name	Location	Products
Light Vehicle Manufacturers		
Canadian Automobile Mfg. Inc. (CAMI) http://www.cami.ca/start.htm	Ingersoll, Ontario	Suzuki Swift, Suzuki Vitara, Chevrolet Tracker
Daimler Chrysler Canada Ltd. http://www.daimlerchrysler.ca	Bramalea, Ontario	Concorde, Dodge Intrepid, LHS, 300M
	Windsor, Ontario	Dodge Caravan, Grand Caravan, Plymouth Voyager, Grand Voyager
	Windsor, Ontario (Pilette Road)	Dodge Ram, Ram wagon
Ford of Canada Ltd. http://www.ford.ca/fordFlash.html	Oakville, Ontario	Windstar, F series
	Oakville, Ontario	F series
	St. Thomas, Ontario	Crown Victoria, Mercury Grand Marquis
Honda Canada Manufacturing Inc. http://www.honda.ca	Alliston, Ontario	Acura EL, Civic, Acura MD-X
	Alliston, Ontario	Odyssey
General Motors of Canada Ltd. http://www.gmcanada.com/english/home/home.html	Oshawa, Ontario	Lumina, Monte Carlo, Impala
	Oshawa, Ontario	Century, Regal, Impala
	Oshawa, Ontario	GMC Sierra (extended cab), Silverado (extended cab)
	Sainte-Thérèse, Quebec	Camaro/ Firebird
	Cambridge, Ontario	Corolla
	Cambridge, Ontario	Lexus RX-300
Heavy-Duty Truck Manufacturers		
Navistar International Corporation Canada http://www.navistar.com	Chatham, Ontario	Heavy-duty trucks
Sterling Trucks (Division of Freightliner of Canada Ltd. http://www.sterlingtrucks.com	St. Thomas, Ontario	Heavy-duty trucks
Western Star Trucks Inc. http://www.westernstarholdings.com	Kelowna, British Columbia	Heavy-duty trucks

Table 6.1

Major Motor Vehicle Assembly Plants in Canada

Bus Manufacturers			
Canadian Bluebird Coach Ltd.	Brantford, Ontario	School buses	
DaimlerChrysler Canada Ltd. http://www.daimlerchrysler.ca	Windsor, Ontario	Mini-buses (10-15 passenger)	
Entreprise Michel Corbeil http://paiauto.com/kw	Ville de Laurentide, Quebec	School buses	
Girardin Inc. http://girardin.com/indexA.htm	Drummondville, Quebec	Mini school buses	
Novabus http://novabus.com/index-e.htm	Saint-Eustache, Quebec	Urban transit buses	
Motor Coach Industries Ltd. http://www.motorcoach.ca	Winnipeg, Manitoba	Highway buses	
New Flyer Industries Ltd. http://www.newflyer.com	Winnipeg, Manitoba	Urban transit buses	
Orion http://www.transit-center.com/Orion	Mississauga, Ontario	Urban transit buses	
Prévost Car Inc. http://www.prevostrcar.com	Sainte-Claire, Quebec	Highway buses	
Thomas Built Buses of Canada http://www.thomasbus.com/index.html	Woodstock, Ontario	School buses	



Glossary

Glossary of Automotive Terms

Aftermarket (Replacement Market) - all products and services used in the repair and maintenance of vehicles.

Aftermarket part - goods not for use as original equipment in the production of light-duty vehicles or heavy-duty vehicles, i.e. products and services used in the repair and maintenance of these vehicles, or accessories.

Agent or broker - an intermediary with legal authority to operate on behalf of the manufacturer.

American Automobile Labelling Act (AALA) - regulations requiring vehicle manufacturers to include content information on vehicle labels for cars and trucks for sale in the U.S. after October 1, 1994.

Anti-lock braking system (ABS) - System that automatically controls wheel slip or prevents sustained wheel-locking on braking.

Asia Pacific Economic Cooperation (APEC) - An organization established in 1989 to promote trade and investment in the Pacific Basin. APEC now comprises eighteen countries located in and around the Pacific Ocean: Australia, Brunei, Canada, Chile, China, Hong Kong, Indonesia, Japan, Malaysia, Mexico, New Zealand, Papua New Guinea, the Philippines, Singapore, South Korea, Taiwan, Thailand, and the United States.

Association of South East Asian Nations (ASEAN) - an organization of states (including Brunei, Myanmar, Burma, Indonesia, Laos, Malaysia, the Philippines, Singapore, Thailand, and Vietnam) founded in 1967 to present an

united front that addresses the political, economic, and strategic dynamics of the region.

Auto Pact base year - With respect to the Auto Pact, the 12 month period beginning on August 1, 1963, and ending on July 31, 1964.

Auto Pact Canadian value added - the aggregate of the costs of parts, material, labour costs, and transportation costs that are reasonably attributed to the production of vehicles or parts by manufacturers producing vehicles in Canada.

Automated Guided Vehicle System (AGVS) - vehicles equipped with automatic guidance equipment which follow a prescribed path, stopping at each machining or assembly station for manual loading and unloading of parts.

Autodealership or auto dealer - a retail outlet that carries one (or in some cases in the U.S., a number of) manufacturer's product lines and sells to general consumers and fleet operators. The outlet will also provide service and sell parts for the brands of vehicles that it carries. In some instances, a dealer may dual for another manufacturer's product line.

Automobile - four-wheeled passenger motor vehicle having a seating capacity for not more than 10 people including police cars and racing cars but not including ambulances or hearses.

Auto parts store - jobber and retail auto parts stores which primarily sell automotive products and conduct business at the retail level.

Glossary of Automotive Terms

Average weekly earnings - gross taxable payrolls divided by the number of employees; includes overtime pay.

Big Three - General Motors, Ford and Chrysler.

Body shop - service outlet specializing in vehicle body repair work.

Bus - passenger motor vehicle or chassis having seating capacity for more than 10 people.

Buying decisions - the act of determining whether or not a product purchase or repair, will be made, and/or which product or service will be purchased.

Canada-U.S. Free Trade Agreement (FTA) - Implemented in January 1989 to eliminate all tariffs on U.S. and Canadian goods by January 1998 and to reduce or eliminate many non-tariff barriers.

Canadian Automotive Repair and Service Council (CARS) - a not-for-profit organization established to serve the human resource and training needs of the Canadian car and truck repair and service industry.

Canadian cross border shopping - cross border shopping describes the purchasing by Canadian consumers of products in the United States. Of particular interest is the decision by these buyers to obtain their products in the U.S., even though similar products are available in the Canadian market.

Canadian Environmental Protection Act (CEPA) - act where the goal is to pollution prevention and protection of Canadians from toxic substances.

Capacity - maximum production attainable under normal conditions. With regard to normal conditions, the company's operating practices are to be followed with respect to the use of production facilities, overtime, workshifts, holidays, etc.

Capital Expenditures - expenditures to acquire or add to capital assets that will yield benefits over several accounting periods. Included are cost of procuring, construction, installing new durable plants, machinery and equipment where for replacement, addition or for lease or rent to other companies including subsidies.

Captive Import - an imported motor vehicle or part manufactured by another automaker usually for sale under the brand name of the importer.

Casting - a process technology that delivers a liquid molten metal or plastic into a purpose-built mould. After cooling, the solid metal surface has the shape of the mould cavity.

Census value added - residual representing the difference between the value of goods and industrial services produced and the direct material costs associated with the production of goods.

Changeover - the refitting of equipment to either neutralize the effects of the just completed production or to prepare

Glossary of Automotive Terms

equipment for production of the next scheduled item, or both.

Climate Change - the international concern that increasing concentrations of greenhouse gases (GHGs) in the atmosphere are changing the climate in ways detrimental to our social and economic well-being.

Component - a raw material, ingredient, part or subassembly that at goes into a higher level assembly, compound, or other item.

Component assembly - a combination of two or more parts or sub-components to form an assembly.

Component Design - the activity for the design of specific components including responsibility for material, cost, weight, reliability, durability, function, appearance, serviceability.

Concept Vehicle - a current production vehicle modified for installation of new design concepts for evaluation of functional feasibility.

Consumer factors - demographic characteristics of consumers including age, gender, income and geographic location, afford ability.

Corporate Average Fuel Economy (CAFE) - regulation enacted in 1975 which requires a motor vehicle manufacturer to classify its U.S. vehicle fleet sales as either domestic or import for the purpose of fuel economy averaging.

Cost of production - actual cost to the manufacturer of producing a vehicle (does not include mark-up).

Customs duties - customs duties levied on imported goods under the Customs Tariff.

Days' Supply - number of days needed to sell all vehicles in inventory, based on the previous month's sales rate.

Dealer - a firm that buys and sells, adding some value for the consumer in the process. Dealer often means a firm which operates closer in the distribution channel to the consumer than a distributor or wholesaler, and may add more value for consumers than either of the above-mentioned terms.

Dealer principal - the individual or corporation that owns and controls one or a number of auto dealerships.

Die - solid or hollow form used for shaping materials by stamping, pressing, extruding, drawing or threading.

Diffusion - the way in which innovations spread through market or non-market channels.

Distributor - synonymous with wholesalers; distributors perform many of the same functions as wholesalers, such as selling, physical distribution, credit, etc. Some industries use the term distributor instead of wholesaler.

Distribution channel - is the path goods take as their title transfers from producer to consumer. The title transfer for consumer goods is usually accompanied by transfer of the physical goods, as well.

Do-it-Yourself Market (DIY) - the vehicle maintenance and repairs conducted by the vehicle owner or friend/relative who purchase auto parts from a retail outlet.

Glossary of Automotive Terms

Domestic - a vehicle produced in Canada, United States or Mexico.

Door rates - the hourly rates charged by dealers on standardized units of service work. Hourly rates may or may not correspond to an actual hour of work.

Duty drawback - import duties or taxes repaid by a government in whole or in part, when the imported goods are re-exported or used in the manufacture of exported goods.

Duty paid value - in respect to imported goods, is the aggregate value for duty on imported goods.

Duty waiver - forgiveness, in whole or in part, of import duties when certain conditions are met.

Electric Vehicle - cars, buses, vans or trucks which use dedicated or hybrid electric systems as their power source.

Employment - total employment in each manufacturing facility, including total manufacturing employees, total support staff, and total engineering/R&D staff. Production workers relate to the average number actually engaged in the manufacturing process. Administrative and non-manufacturing includes employees at head offices and sales offices.

Employee Benefits - the provision of direct (salary, bonuses, etc.) indirect (vacation leave, medical and dental plans, etc.) and deferred employee compensation (pensions, etc.)

Establishment - smallest operating entity producing a homogenous set of goods and services and is capable of reporting full range of production account variables to calculate "value added".

Free Trade Agreement of the Americas (FTAA) - an effort to unite the economies of the Western Hemisphere into a single free trade arrangement. The Heads of State of the 34 democracies in the region agreed to construct a "Free Trade Area of the Americas" and to complete negotiations for the agreement by 2005.

Finance & control - ownership of company (ie. Canadian, U.S., Japanese, German, etc.); public or private; capital investments: buildings, machinery and equipment, tooling programs

Firm - a business or institution comprising sole proprietorships, partnerships, companies and other forms of organizations.

Fixed or One Price Selling - published fixed price displayed on a new vehicle eliminating need for negotiation with the dealer.

Fixture - device for holding goods in process while working tools are in operation that does not contain any special arrangements for guiding the working tools.

Fleet sales - the purchase of vehicles by a business that meet a minimum requirement of units sold.

Forecast - prediction of future production or sales in the automotive industry.

Glossary of Automotive Terms

Forging - a process that transforms solid metal into shapes of varying cross-sectional material thickness, often involving heating.

Franchise - establishment that has the right to exercise the powers of a corporation.

G7 (Group of Seven) - Seven industrial countries consisting of the United States, Japan, Germany, France, the United Kingdom, Italy and Canada, whose leaders have met at annual economic summits since 1975 to coordinate economic policies.

General Agreement on Tariffs and Trade (GATT) - Signed in 1947, the GATT was formal multilateral agreement aimed at expanding and liberalizing world trade. The World Trade Organization which is the successor to the GATT came into existence on January 1, 1995.

Generalized Preferential Tariff (GPT) - system of non-reciprocal tariff preferences for the benefit of developing countries. It grants duty-free or preferential entry to imports for eligible developing countries up to a certain dollar value or import percentage limit.

Greenhouse gases (GHGs) - group of gases which individually act to trap solar energy near the earth. GHGs for which emission levels have been estimated are carbon dioxide (CO₂), methane (CH₄), nitrous oxide (N₂O), sulphur hexafluoride (SF₆), carbon tetrafluoride (CF₄), carbon hexafluoride (C₂F₆) and hydro fluorocarbons (HFCs).

Grey market - the grey market describes the purchase by intermediaries of vehicles which are not supplied to them by

the "authorized" distribution channel of the supplier. Thus, a dealer in the U.S. that sells a vehicle bought in Canada from other than the manufacturer is supplying grey market goods. While grey market products are frequently the same as would be available from conventional channels in the U.S. or Canada, the grey market assumes responsibility for service or repair where the manufacturer declines this support.

Gross Vehicle Weight (GVW) -Maximum legal weight at which a vehicle can be operated.

Heavy-duty truck - vehicle weighing from 26,001 to 33,001 lbs. Also included off-highway trucks.

Ignition System - Electrical system devised to produce timed sparks from engine spark plugs. Consisting of a battery, induction coil, capacitor, distributor, spark plugs and relevant switches and wiring.

Importer - an organization that typically operates at arms length or under contractual agreement with manufacturers to bring products made in another country into Canada

Import Nameplate - vehicles sold by manufacturers primarily located outside North America whether assembled Overseas or in North America

Independent Repair Shop - small service outlet offering specialized repair services. They usually do not sell gasoline

Intellectual Property Rights (IPR) - the right to possess or control the use of intellectual property, such as trademarks, copyrights, patents and trade secrets.

Glossary of Automotive Terms

Interchannel competition - rivalry between different channels of the distribution system. For example, independent retailers competing with manufacturers' outlets.

Intermediary - firm or organization that operates between the producer of the goods and the end purchaser. Thus, the members of the distribution channel noted above are intermediaries or "middlemen".

Intrachannel competition - rivalry between channel participants at the same level in the distribution channel. For example, department stores competing with one another.

Inventories - book value of inventory owned and held in Canada.

Jigs - device used in the accurate machining of good in process by holding the goods firmly and guiding tools exactly to position.

Joint venture - an international business collaboration between foreign interests and private parties from a host country in which two or more parties establish a new business enterprise to which each contributes and where ownership and control are shared.

Just-in-Time (JIT) - refers to the movement of material to the necessary place at the necessary time. It is part of a business philosophy based on achieving excellence in a manufacturing company through the continuous elimination of waste.

Kaizen - a production system for continuous improvement in process, quality, cost, etc.

Kyoto Protocol - international agreement among industrialized countries negotiated in Kyoto, Japan in December 1997 to reduce greenhouse gas emissions. Canada committed to reduce its greenhouse gas emissions by 6 percent of 1990 levels between 2008 and 2012.

Lease - form of contract transferring the use of a vehicle in consideration of payment.

Light truck - vehicle weighing less than 14,000 lbs.

Light vehicles - passenger cars and light trucks.

Loss leader - products whose prices are cut with the idea that they will attract customers to the store.

Make - brand name of a car or truck (i.e. Chevrolet, Ford, Dodge, Honda).

Manufacturer's Suggested Retail Price (MSRP) - Dealers typically sell at a discount to this price.

Machining - an operation which shapes metal parts by carving away excess material as chips produced in a sequential process of turning, milling and grinding operations.

Manufacturing - process technology (i.e. metal forming, machining, injection moulding, blow moulding, die casting, forgings, electronics/electrical, assembly, coating/plating); capacity utilization (in percent); production volumes;

Glossary of Automotive Terms

strategic alliances (eg. joint ventures, technology agreements).

Market share - the percentage of total sales represented by an individual manufacturer/importer, make or nameplate.

Margin or gross margin - the return an intermediary achieves on the selling price of the article. That is, if the intermediary buys a product for \$1 and sells it for \$1.50, the margin is calculated. For example, .50 divided by \$1.50, or 33%.

Mark-up - Mark-up is the return an intermediary achieves on the cost price of an article. Using the same example described above, mark-up is .50 divided by \$1, or 50%.

Maquila (maquiladora) - Mexican plants located in a zone near the U.S.-Mexican border where most production is exported to the United States.

Mechanic installed market (MIL) - vehicle maintenance and repair conducted by a mechanic/professional at a service outlet.

Medium-duty truck - vehicle weighing from 14,001 to 26,000 lbs.

Mercosur - the southern cone common market of Argentina, Brazil, Paraguay and Uruguay. Mercosur enacted a common external tariff on January 1, 1995 for almost 85 percent of tariff items of the four countries; most trade among members will be duty-free.

Metal forming - solid metal and molten metal process such as casting, forging, stamping and machining.

Methylcyclopentadienyl Manganese Tricarbonyl (MMT) - organic manganese compound used as a fuel additive to enhance octane levels in gasoline.

Model line - group of motor vehicles having the same platform or model name.

Model name - word, group of words, letter, number or similar designation assigned to a motor vehicle by a marketing division of a motor vehicle assembler.

Most-Favoured-Nation (MFN) Treatment - one country's commitment to extend to another country the lowest tariff rates that it applies to any third country.

Motor Vehicle Safety Act (MVSA) - act which regulates the manufacture and importation of motor vehicles and motor vehicle equipment to reduce risk of death, injury and damage to property and the environment.

Mould - hollow form, matrix or cavity into which materials are placed to produce goods of desired shapes.

North American Industrial Classification System (NAICS) - Industry classification between Canada, the United States and Mexico to increase compatibility of data with these countries. The classification is based on establishment rather commodity. This classification system will be implemented with reference to year 1997 and data will be available in 1999.

Net sales value - the selling price received by the manufacturer for the vehicle including the cost of transporting the vehicle in Canada (includes mark-up).

Glossary of Automotive Terms

New car dealer - major car dealership with a parts and service operation.

North American Free Trade Agreement (NAFTA) - Agreement creating free trade among the United States, Canada and Mexico. The NAFTA went into effect on January 1, 1994.

North American produced - motor vehicles assembled in Canada, the United States or Mexico.

Off-Highway Vehicle - Vehicle intended for operation on unmade surfaces or rough terrain (i.e. for construction or agriculture).

On Board Diagnostics (OBD) - a unit that monitors the Electronic Control Unit and system responses for errors during normal vehicle operations. When the vehicle is serviced, this information on the errors can be down loaded and displayed to the service personnel which will facilitate the trouble shooting process.

Operating profit - pre-tax earnings after deducting all operating expenses from gross margin.

Organization for Economic Co-operation and Development (OECD) - an organization whose purpose is to provide its 29 Member countries with a forum in which governments can compare their experiences, discuss the problems they share and seek solutions which can then be applied within their own national contexts. Each member country is committed to the principles of the market economy and pluralistic democracy.

Outlet - synonymous with vehicle dealership.

Overcapacity - the situation where maximum global production of automobiles exceeds the total global demand for automobiles.

Overtime - includes pay received for the number of hours worked in excess of the standard workday or workweek.

Partnership for a New Generation of Vehicles (PNGV) - established in 1993, this partnership, between the United States Federal Government and the automotive industry, was founded to establish global technical leadership in the development and production of affordable, fuel-efficient, low emission vehicles that meet today's performance standards.

Passenger vehicle - four wheeled motor vehicle that also includes mini-vans and sport utility vehicles.

Plastic moulding - a process that converts organic-based materials, by means of a general-purpose press and purpose-built tooling under controlled heat and pressure, and injects the hot material into a die cavity shaped in the final form of the intended part.

Platform - primary load-bearing structural assembly of a motor vehicle determining the basic size of the motor vehicle, and is the structural base that supports the drive line and links the suspension components of the motor vehicle. Also serves as a base common design for other models of vehicles.

Process Innovation - a significant change in the technology of the production of an item which may involve new equipment, new management and organization methods.

Glossary of Automotive Terms

Product Innovation - commercialization of a technologically changed product, whose design characteristics are changed in ways which deliver new or improved services to the consumer.

Pneumatic Tire - Flexible, hollow rubber forming the outer part of the vehicle wheel and inflated by air pressure.

Product design - the process of planning the product's specifications.

Product testing - rigorous methods whereby a product's quality and durability are measured.

Product planning - a function whereby an enterprise is responsible for the efficient, planning, scheduling and coordination of production activities.

Production engineering - planning and control of the mechanical means of changing the shape, condition of materials toward greater effectiveness and value.

Productivity - relative measure of output per labour and/or machine output.

Program cars - automobiles sold by manufacturers for fleet use. Usually applies to very large fleets, such as those of car rental companies.

Program Objectives - A consensus of what has been determined to be the most marketable product for a given model year.

Purchasing - total materials purchased for manufacturing/assembly into auto parts (ie. steel, plastics, rubber, textiles, etc.)

QDC - quick die change

Quality - conformance to requirements in relation to a degree of excellence.

Refit - closure of a plant for the purpose of plant conversion or retooling.

Registration - motor vehicle ownership that is filed with the province/state.

Research & development - R&D expenditures (product and process development).

SAE - Society of Automotive Engineers.

Sales - total automotive product sales (vehicles, automotive parts, including OE and aftermarket)

Scientific Research and Experimental Development (SR&ED) Program - incentive for industrial research and development in Canada which allows individuals and companies to deduct 100 percent of qualified current SR and ED expenditures and capital SR and ED expenditures.

Scrappage - a vehicle registered in the previous year but not re-registered in the current year.

Service station - outlets which sell gasoline and are operated by the major oil companies.

Glossary of Automotive Terms

Shipments (value of) - summation of value of shipments produced by establishment, receipts of custom and repair revenue.

Special Import Measures Act (SIMA) - legislation that helps to protect Canadian producers from harm or injury caused by the dumping of goods into Canada by foreign exporters or the subsidizing of goods by foreign governments.

Special services - a category that describes plants which add value to automotive parts manufactured by others by using process such as painting, plating, heat treatment, etc.

Specialty repair shop - retail outlet which offers specialized vehicle products and service.

Stamping - a process technology which manufactures automotive parts by shaping rolled sheet metal or by bending or stretching it in a sequence of purpose-built tools fitted to a general purpose press.

Standard Industrial Classification (SIC) - industry class that represents a level of organization of production by type of specialization. Currently the 1980 Standard Industrial Classification is in effect identifying each industry at the 4 digit level. In 1997, the North American Industrial Classification System (NAICS) comes into effect.

Standard Work Week - average number of hours worked normally scheduled in a work week.

Subsidiary - a subsidiary is an organization operating in Canada that is owned or controlled by a foreign company which may or may not manufacture in Canada.

Supplier Cost Reduction Effort (SCORE) - a United States program that urges suppliers to develop processes to cut costs. Suppliers are allowed to keep half the savings and pass on the other half to the automakers.

SUV - Sports Utility Vehicle

Tariff - A duty or tax imposed on imports

Tier 1 Supplier - direct supplier to the vehicle assemblers, and who are responsible for delivery of a finished assembly, product development and continued technology renewal.

Tier 2 Supplier - producer of parts providing value-added to minor sub-assembly.

Tier 3 Supplier - supplier of engineered materials and special services, such as rolls of sheet steel, bars and heat treating, surface treatments.

Tire store - retail outlet selling tires and offering vehicle repair services.

Total Quality Management (TQM) - A management technique to improve the quality of goods and services, reduce operating costs and increase customer satisfaction.

Tool - device for use in, or attachment to, production machinery that is for the assembling of materials or the working of materials by turning, milling, grinding, polishing, drilling, punching, boring, shaping, shearing, pressing or planning.

Glossary of Automotive Terms

Tooling - set of required standard or special tools needed to produce a particular part; includes jigs, fixtures, gages and cutting tools, but excluding machined tools.

Trim Level - vehicle designation assigned by vehicle manufacturers that represent specific equipment packages.

Used vehicle - vehicle that has been previously owned or driven.

United States Council for Automotive Research (USCAR) - an organization founded by Chrysler, Ford, and General Motors to strengthen the technology base of the domestic automotive industry through research and co-operation.

VA - Value analysis

VE - Value engineering

VER - Voluntary export restraint in relation to Japanese manufacturers exporting to Canada (no longer in effect).

VRA - Voluntary restraint agreement in relation to Japanese manufacturers exporting to the United States (no longer in effect).

Vehicle Identification Number (VIN) - Number assigned to a vehicle by the manufacturer primarily for registration and identification purposes (consisting of numerals and letters).

Windsor Experiment - Chrysler Canada, in partnership with government and educational institutions, has launched a number of initiatives collectively referred to as the Windsor Experiment. The Windsor Experiment conducts studies to

benchmark "best practice" training and education in Europe, and applied the results in various skills development programs.

World Trade Organization (WTO) - Created by the Uruguay Round and successor to the GATT, this new organization began operations on January 1, 1995.

Wholesaler - an intermediary which sells to other intermediaries, such as a firm that buys from a manufacturer and sells to a retailer.

Automotive Associations

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